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ABSTRACT

This module, one in a series of competency-based administrator instructional packages, focuses on a specific competency that vocational education administrators need to be successful in the area of personnel management. The purpose of the module is to provide administrators with information and practice relating to each component of the personnel selection process. An introduction provides terminal and enabling objectives, a list of resources needed, and a glossary of selected terms. The main portion of the module includes seven sequential learning experiences. Overviews, which precede each learning experience, contain the objective for each experience and a brief description of what the learning experience involves. Each learning experience consists of a number of activities that may include information sheets, case studies, samples, checklists, and self-checks. Optional activities are provided. The final learning experience also provides an assessment form for administrator performance evaluation by a resource person. (YLB)

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Select School Personnel

MODULE
LT-D-1

Module LT-D-1 of Category D —
Personnel Management

COMPETENCY-BASED VOCATIONAL EDUCATION ADMINISTRATOR MODULE SERIES

Consortium for the Development of
Professional Materials for Vocational Education

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The National Center for Research in Vocational Education
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Direction is given by a representative from each of the states, provinces and territories. AAVIM also works closely with teacher organizations, government agencies and industry.

The work presented herein was performed by the National Center for Research in Vocational Education on behalf of the Consortium for the Development of Professional Materials for Vocational Education. Sponsors and members of the Consortium for 1979-1980 included the following states and/or cooperating agencies: the Florida Department of Education, Division of Vocational Education, and Florida International University, Division of Vocational Education; the Illinois State Board of Education, Department of Adult, Vocational, and Technical Education, and Southern Illinois University at Carbondale; the New York State Education Department, Office of Occupational and Continuing Education; the North Carolina Department of Public Instruction, Division of Vocational Education; the Ohio State Department of Education, Division of Vocational Education; and the Pennsylvania Department of Education, Bureau of Vocational Education, and Temple University, Department of Vocational Education. The opinions expressed herein do not, however, necessarily reflect the position or policy of any of the sponsors, and no official endorsement by them should be inferred.

FOREWORD

The need for competent administrators of vocational education has long been recognized. The rapid expansion of vocational education programs and increased student enrollments have resulted in a need for increasing numbers of vocational administrators at both the secondary and postsecondary levels. Preservice and inservice administrators need to be well prepared for the complex and unique skills required to successfully direct vocational programs.

The effective training of local administrators has been hampered by the limited knowledge of the competencies needed by local administrators and by the limited availability of competency-based materials specifically designed for the preparation of vocational administrators. In response to this pressing need, the Occupational and Adult Education Branch of the U.S. Office of Education, under provisions of part C--Research of the Vocational Education Amendments of 1968, funded the National Center for a scope of work entitled "Development of Competency-Based Instructional Materials for Local Administrators of Vocational Education" during the period 1975-77. That project had two major objectives:

1. To conduct research to identify and nationally verify the competencies considered important to local administrators of vocational education.
2. To develop and field test a series of prototypic competency-based instructional packages and a user's guide. One hundred sixty-six (166) high priority competencies were identified and six prototypic modules and a user's guide were developed, field tested, and revised.

Although six modules had been developed, many more were needed to have competency-based materials that would address all the important competencies that had been identified and verified. In September 1978 several states joined with the National Center for Research in Vocational Education to form the Consortium for the Development of Professional Materials for Vocational Education. Those states were Illinois, Ohio, North Carolina, New York, and Pennsylvania. The first five states were joined by Florida and Texas later in the first year. The first objective of the Consortium was to develop and field test additional competency-based administrator modules of which this is one.

Several persons contributed to the successful development and field testing of this module on selecting school personnel. Linda Pfister, Research Specialist, was responsible for developing the field-review edition of the module. Lois G. Harrington, Program Associate, assumed responsibility for further development, refinement, and editing of the field-test and final versions of the module. Recognition also goes to the two consultants who helped conceptualize the module and prepared draft materials for the manuscript: Wayne Asche, Associate Professor, Department of Vocational Education, Kent State University, Kent, Ohio; and Helene Schwarberg, T & I Teacher Educator, University of Cincinnati, Cincinnati, Ohio.

Acknowledgement is given to the two official reviewers who provided critiques of the module and suggestions for its improvement: T. Carl Brown, retired as Chief Consultant of Distributive Education from the State Department of Public Instruction in North Carolina; and Robert D. Muzzi, Director of Vocational Education, Lackawanna County AVTS, Scranton, Pennsylvania.

Credit goes to Robert E. Norton, Consortium Program Director, for providing program leadership and content reviews. Thanks go to Ferman B. Moody, Associate Director for Personnel Development, for his administrative assistance.

Appreciation is also extended to Calvin Cotrell, James Haire, George Kosbab, Helen Lipscomb, Aaron J. Miller, Dominic Mohamed, Robert Mullen, James Parker, Dale Post, Wayne Ramp, and Kenneth Swatt for their service as state representatives, state department contacts, and field-test coordinators; and to the other teacher educators and local administrators of vocational education who used the modules and provided valuable feedback and suggestions for their improvement. Last, but certainly not least, thanks and credit are due Deborah Linehan, Consortium Program Secretary, for her patience and expert skill in processing the many words necessary to make this module a quality document.

Robert E. Taylor
Executive Director
The National Center for Research
in Vocational Education

INTRODUCTION

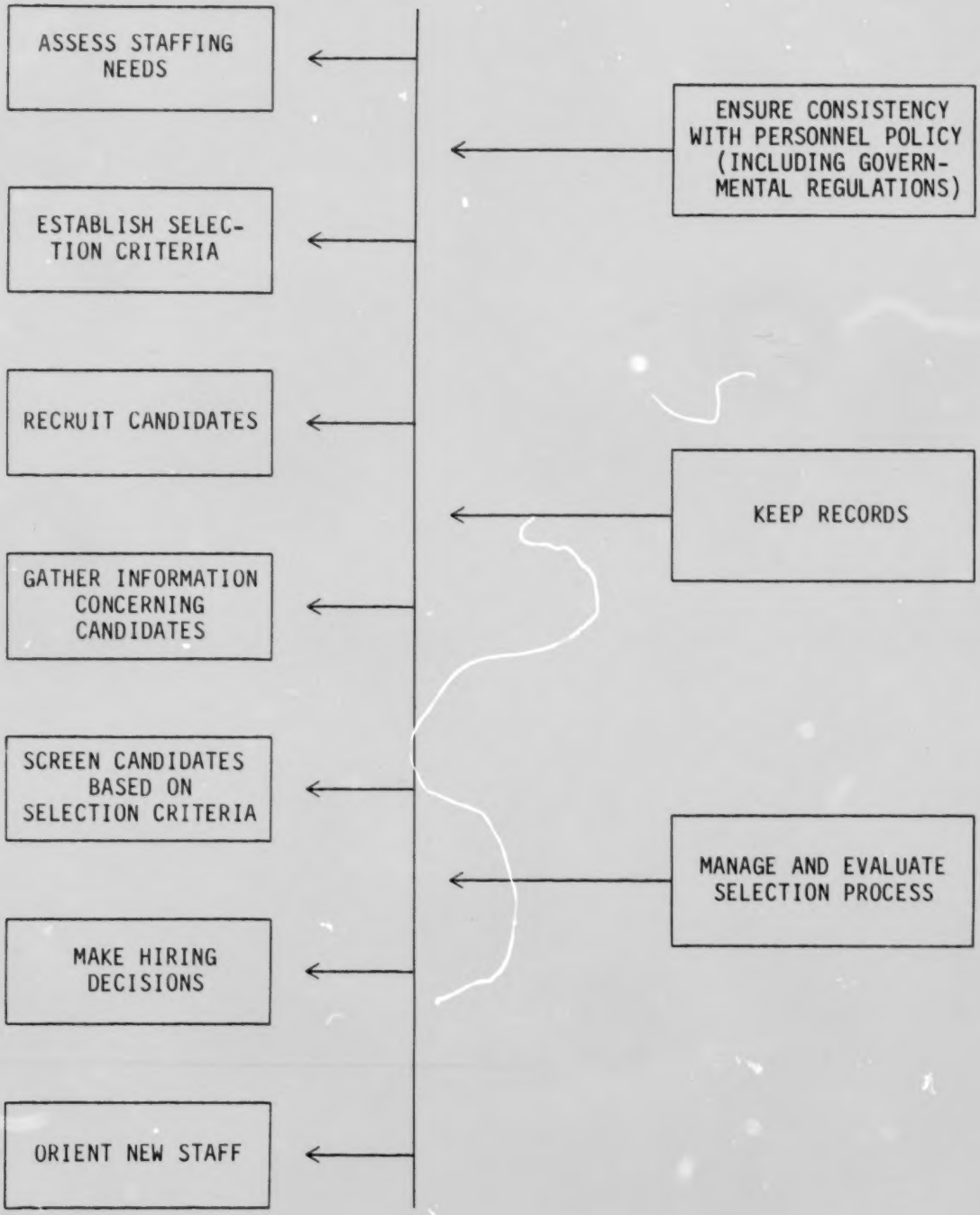
An educational institution is only as good as the people who work in it. This slight alteration to an age-old adage is important to keep in mind--especially as you begin to examine the process of selecting personnel. Your success as a vocational administrator depends heavily on your skills in selecting competent personnel who can do the work of the institution honestly, efficiently, and to the satisfaction of the students and community.

The role of the vocational education administrator in the selection of school personnel varies, depending upon the size of the institution and the types of positions that need to be filled. In small institutions, vocational education administrators are often very directly involved in hiring, promoting, and dismissing all levels of staff--administrators, instructors, and nonprofessional staff. In a large system, however, the vocational education administrator may serve in an advisory role to a personnel department, especially when hiring staff who provide services that are supportive of, but not directly related to, the instructional process--e.g., secretary or groundskeeper.

Keep in mind, however, that selecting staff is a two-way decision-making process. The potential employee is also gathering and evaluating information about you and your staff. Vocational education administrators who keep the needs of both the institution and the individual applicant in mind throughout the selection process strive to make the best match possible.

Ideally, the result will be staff members who complement one another's skills. This takes time, but when it occurs you have created a "synergistic" system--one that is actually greater than the sum of its parts.

This module is designed to provide you with information and practice relating to each component of the personnel selection process. As shown in the figure on the following page, it is a flow of events that is orderly and sequential, beginning with assessing institutional needs and ending with effectively orienting new staff into the system. By completing this module, you will develop the skills you need to effectively plan and manage this key administrative process.



PERSONNEL SELECTION PROCESS

Module Structure and Use

This module contains an introduction and seven sequential learning experiences. Overviews, which precede each learning experience, contain the objectives for each experience and a brief description of what the learning experience involves.

Objectives

Terminal Objective: While working in an actual administrative situation, select school personnel. Your performance will be assessed by your resource person, using the "Administrator Performance Assessment Form," pp. 111-114. (Learning Experience VII)

Enabling Objectives:

1. After completing the required reading, critique the performance of an administrator in a given case study in establishing the foundations for staff selection. (Learning Experience I)
2. After completing the required reading, develop a job description for a given position. (Learning Experience II)
3. After completing the required reading, critique the performance of an administrator in a given case study in recruiting candidates to fill a position. (Learning Experience III)
4. After completing the required reading, critique the performance of an administrator in a given case study in gathering and screening information concerning a candidate. (Learning Experience IV)
5. After completing the required reading, critique the performance of an administrator in a given case study in managing the staff selection process. (Learning Experience V)
6. After completing the required reading, critique the performance of an administrator in a given case study in orienting staff. (Learning Experience VI)

Resources

A list of the outside resources that supplement those contained within the module follows. Check with your resource person (1) to determine the availability and the location of these resources, (2) to locate additional references specific to your situation, and (3) to get assistance in setting up activities with peers or observations of skilled administrators.

Learning Experience I

Optional

- SAMPLE PERSONNEL POLICIES that you can review.
- AN EXPERIENCED ADMINISTRATOR whom you can interview concerning the assessment of staff needs.

Learning Experience II

Optional

- SAMPLE JOB DESCRIPTIONS that you can review.

Learning Experience III

Optional

- AN EXPERIENCED ADMINISTRATOR whom you can interview concerning the recruitment of candidates for given positions.

Learning Experience IV

Optional

- SAMPLE DEVICES FOR GATHERING INFORMATION ABOUT CANDIDATES that you can review.
- AN EXPERIENCED ADMINISTRATOR whom you can interview concerning information-gathering devices and screening procedures.

Learning Experience V

Optional

- AN EXPERIENCED ADMINISTRATOR whom you can interview concerning the management of the staff selection process.

Learning Experience VI

Optional

- AN EXPERIENCED ADMINISTRATOR whom you can interview concerning staff orientation.

Learning Experience VII

Required

- AN ACTUAL ADMINISTRATIVE SITUATION in which, as part of your duties, you can select school personnel.
- A RESOURCE PERSON to assess your competency in selecting school personnel.

Selected Terms

Administrator--refers to a member of the secondary or postsecondary administrative team. This generic term, except where otherwise specified, refers to the community college president, vice-president, dean, or director; or to the secondary school principal, director, or superintendent.

Board--refers to the secondary or postsecondary educational governing body. Except where otherwise specified, the term "board" is used to refer to a board of education and/or a board of trustees.

Institution--refers to a secondary or postsecondary educational agency. Except where otherwise specified, this generic term is used to refer synonymously to secondary schools, secondary vocational schools, area vocational schools, community colleges, postsecondary vocational and technical schools, and trade schools.

Resource Person--refers to the professional educator who is directly responsible for guiding and helping you plan and carry out your professional development program.

Teacher/Instructor--these terms are used interchangeably to refer to the person who is teaching or instructing students in a secondary or postsecondary educational institution.

User's Guide

For information that is common to all modules, such as procedures for module use, organization of modules, and definitions of terms, you should refer to the following supporting document:

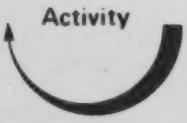
> Guide to Using Competency-Based Vocational Education Administrator Materials. Columbus, OH: The Center for Vocational Education, The Ohio State University, 1977.

This module addresses task statement numbers 59-63, 78-80 and 124 from Robert E. Norton et al., The Identification and National Verification of Competencies Important to Secondary and Post-Secondary Administrators of Vocational Education (Columbus, OH: The Center for Vocational Education, The Ohio State University, 1977). The 166 task statements in this document, which were verified as important, form the research base for the National Center's competency-based administrator module development.

Learning Experience I

OVERVIEW

After completing the required reading, critique the performance of an administrator in a given case study in establishing the foundations for staff selection.



You will be reading the information sheet, "Foundations for Staff Selection," pp. 9-17.

You may wish to review sample personnel policies.

You may wish to interview an experienced administrator to determine what methods he/she uses to assess staff needs.

You will be reading the "Case Study," p. 19, and critiquing the performance of the administrator described.

You will be evaluating your competency in critiquing the administrator's performance in establishing the foundations for staff selection by comparing your completed critique with the "Model Critique," pp. 21-22.

NOTES

Activity

Through the retirement, promotion, resignation, or dismissal of present staff, through the initiation of a new program, or through an increase in student enrollment, the selection of new staff becomes necessary. In order for staff selection to be effective, efficient, and economical, it must be governed by a well-thought-out procedure. To learn how to develop a sound foundation for your staff selection procedure, read the following information sheet.

FOUNDATIONS FOR STAFF SELECTION

Two tasks are required in preparing the foundations for your staff selection procedure. First, you must locate and review the institution's personnel policy statement to determine what guidelines must be followed in the staff selection process. And second, you must assess what your precise staffing needs are.

Reviewing Personnel Policy

Before developing a staff selection process, your first task should be to review the institution's personnel policy statement. If none exists, then step one should be the development of such a statement. The policy governing the selection of staff establishes an operational framework for the selection process. It provides a philosophy and guidelines, which in turn should provide a basis for determining appropriate selection procedures. It is generally issued and authorized by the board (of education or trustees), although administrative, business, and legal staff would definitely contribute to its development in most cases.

Federal Laws

A policy statement will probably include a statement of commitment to the provision of equal opportunity and affirmative action (see sample 1). Equal opportunity means that each applicant will be judged on the basis of his/her qualifications, regardless of race, color, religion, sex, handicap, or national origin. Affirmative action means that an organization is actively seeking male and female candidates representing a variety of races, colors, religions, and national origins to better reflect the make up of society in general. Governmental laws and regulations related to these concerns may be cited or stated. Since the majority of vocational education institutions receive some form of federal assistance, awareness of and adherence to these laws and regulations are crucial. Sample 2 lists some pertinent laws, executive orders, and guidelines and includes a brief description of the intent of each.

SAMPLE 1

NONDISCRIMINATION AND AFFIRMATIVE ACTION POLICY

The policy of this institution, both traditionally and currently, is that discrimination against any individual for reasons of race, color, creed, religion, national origin, sex, age, handicap, or Vietnam-era veteran status is specifically prohibited. Title IX of the Education Amendments of 1972 prohibits sex discrimination and Section 504 of the Rehabilitation Act of 1973 prohibits discrimination on the basis of handicap in education programs and activities. Accordingly, equal access to employment opportunities, admissions, educational programs, and all other institutional activities shall be extended to all persons, and the institution shall promote equal opportunity through a positive and continuing affirmative action program.

The Office of Affirmative Action shall be responsible for the coordination of matters relating to equal opportunity and this nondiscrimination policy. Information concerning violations of the policy and inquiries regarding institutional compliance with equal opportunity mandates, affirmative action, the requirements of Title IX of the Education Amendments of 1972, Section 504 of the Rehabilitation Act of 1973, and other applicable statutes and regulations pertaining to equality of opportunity should be addressed to the director of the Office of Affirmative Action.

SOURCE: Adapted from a policy statement developed and posted at The Ohio State University, Columbus, Ohio.

SAMPLE 2

LAWS AND ORDERS REQUIRING EQUAL EMPLOYMENT OPPORTUNITY AND AFFIRMATIVE ACTION

Title VII of the Civil Rights Act of 1964 (as amended by the Equal Employment Opportunity Act of 1972)

Title VII prohibits discrimination because of race, color, religion, sex, or national origin, in any term, condition or privilege of employment.

Executive Order 11246 (as amended by Executive Order 11375)

This order, issued by the President in 1965, requires Affirmative Action Programs by all federal contractors and subcontractors and requires that firms with contracts over $50,000 and 50 or more employees develop and implement written programs, which are monitored by an assigned federal compliance agency.

The Equal Pay Act of 1963 (P.L. 88-38)

This act requires that all employers subject to the Fair Labor Standards Act (FLSA) provide equal pay for men and women performing similar work. In 1972, coverage of this act was extended beyond employees covered by FLSA to an estimated 15 million additional executive, administrative, and professional employees (including academic, administrative personnel, and teachers in elementary and secondary schools).

The Age Discrimination in Employment Act (last amended by P.L. 95-256; effective April 6, 1978)

This act prohibits employers of 25 or more persons from discriminating against persons 40-70 in any area of employment because of age.

Title VI of the Civil Rights Act of 1964

Title VI prohibits discrimination based on race, color, or national origin in all programs or activities which received federal financial aid. Employment discrimination is prohibited if a primary purpose of federal assistance is provision of employment (such as apprenticeship, training, work-study, or similar programs). Revised guidelines adopted in 1973 by 25 federal agencies prohibit discriminatory employment practices in all programs if such practices cause discrimination in services provided to program beneficiaries. This could be unequal treatment of beneficiaries or in hiring or assignment of counselors, trainers, faculty, hospital staff, social workers, or others in organizations receiving federal funds. Although Title VI does not explicitly bar sex discrimination, various federal agencies have prohibited such discrimination in their own regulations.

SOURCES: Affirmative Action and Equal Employment--A Guidebook for Employers, Volume I (Washington, DC: U.S. Equal Employment Opportunity Commission, 1974); Betty Southard Murphy, "List of Pertinent Laws, Orders, and Regulations Concerning Equal Employment Opportunity and Affirmative Action," mimeograph, n.d.

Vocational Education Program Guidelines for Eliminating Discrimination and Denial of Services on the Basis of Race, Color, National Origin, Sex, and Handicap, 1979.

These guidelines explain how civil rights laws and federal regulation pertaining to discrimination apply directly to vocational education programs. They were issued because of evidence of continuing discrimination in vocational education programs.

Title IX, Education Amendments Act of 1972

In addition to extending coverage of the Equal Pay Act, Title IX prohibits discrimination on the basis of sex against employees or students of any educational institution receiving federal financial aid. Provisions covering students are similar to those of Title VI of the Civil Rights Act of 1964.

Vocational Rehabilitation Act of 1973 (sections 501, 503, 504, 601-623, 87 Stat. 390, as amended)

This act prohibits discrimination against handicapped persons by federal contractors and requires that federal contractors take affirmative action to employ handicapped persons.

It also provides for nondiscrimination under federal grants or federally assisted programs.

Veterans' Readjustment Act of 1977 (sections 38 U.S.C., ch. 42, sections 2012 and 2014)

Vietnam-Era Veterans' Readjustment Act of 1974 (sections 402 and 403)

These acts require affirmative action on behalf of disabled veterans and Vietnam-era veterans by federal contracts.

Uniform Guidelines on Employee Selection Procedures (29 U.S.C., ch. XIV, part 1607)

Adopted August 22, 1978, by the EEOC, U.S. Civil Service Commission, Department of Labor, and Department of Justice, this gives employers one set of guidelines to meet to avoid discrimination in testing and other employee selection processes.

Other State, Local, and Federal Laws

Many state and local government laws prohibit employment discrimination. Though compliance with federal laws concerning discrimination usually fulfills state and local requirements employers should be familiar with the requirements of their local laws.

State Laws and Guidelines

The state laws and guidelines also affect personnel policies. For example, it is generally the state that specifies the standards for professional certification (see sample 3) and that grants certification to those who meet those standards.

Local Guidelines

The policy statement can also include institutional/district decisions concerning issues such as nepotism--the hiring of relatives. For example, in some institutions, it is against policy to hire both husband and wife, or brother and sister. One intent of such policy was to prevent the hiring of a spouse or sibling of lesser qualifications simply to ensure the hiring of the highly qualified candidate. Another theory was that husband and wife would find each other's presence distracting; personal relationships, it was felt, could not be left at home.

Prohibitions of this type are less common now. The emphasis tends to be on assembling a staff based on qualfications--the contributions a person can make--rather than on relationships, color, religious persuasions, and so on.

Policy may state a commitment to giving priority to the hiring of blacks, or women, or persons from outside the local geographic area, or bilingual persons in order to comply with federal regulations. This can be a very sticky area. First, some communities--especially small, rural ones--may want to hire only teachers from out of their own ranks--hometown folks. The community members want the young people exposed to local views. Their right to this view is certainly valid within the framework of American democracy. However, once such a community accepts federal funds, they have a commitment to comply with the federal view--which is one of integration and equal representation of all groups.

Second, some people equate a commitment to hiring a particular "type" (such as women) to the relaxing of other hiring standards. This is not the intent of the law. Assume you have two candidates--one a man and one a woman. If the woman is more qualified, the law wants her to be hired. The law wants to ensure that she is not rejected just because she is a woman. If the two candidates are equally qualified, the law wants you still to hire the woman if there is a poor representation of females on the staff. If the man is more qualified, then he should be hired. The law is not designed to support the hiring of unqualified candidates. Besides, as one black educator stated, "selecting an unqualified black or woman for a position when his/her chance for success is minimal can severely hamper both the individual's professional career and the future placement of other minorities and women."

Part of local guidelines may also be derived from the agreements entered into with staff (e.g., bargaining agreements, union contracts). These will generally specify some of what can and cannot be required of staff.

SAMPLE 3

CERTIFICATION GUIDELINES FOR VOCATIONAL DEVELOPMENT PERSONNEL

Persons employed in vocational development (vocational guidance, job placement, and follow-up coordinators) should:

1. Be certified in guidance and counseling, with the equivalent evidence of one year in total of two or more work experiences in business or industry, or complete the minimum of a six-week (240 hours) supervised internship--approved by the Personnel Development Unit in the Division of Vocational Education--in business or industry and three hours (3) of additional course work, which would include--

   - three hours (3) in Administration and Supervision of Cooperative Vocational Education.

   O R

2. Hold a baccalaureate degree, along with appropriate employment for three years in some field of job personnel placement such as the Employment Security Commission or private placement service, and be pursuing counselor certification and six hours of additional course work, which would include--

   - three hours (3) in Administration and Supervision of Cooperative Vocational Education,
   - three hours (3) in History and Philosophy of Vocational Education, and
   - an acceptable score on the National Teacher Examination within four months from date of employment.

   O R

3. (If employed as a job placement and follow-up coordinator) be certified in vocational education, with a minimum of three years experience as a coordinator of vocational cooperative programs, and six hours (6) of additional course work, which would include--

   - three hours (3) of Organization of the Guidance Program, and
   - three hours (3) of course work in Techniques of Counseling.

(A provisional certificate will be issued until the completion of all requirements within the designated time frame.)

SOURCE: "Vocational Development--Implementing the Vocational Component of a Comprehensive Guidance Program: A Supplement to the Master Plan for Elementary and Secondary Guidance in North Carolina" (Raleigh, NC: State Department of Education, 1980).

Selection Staff

The policy statement can also include guidelines concerning who is responsible for hiring whom to do what. In a very small institution or district, the local administrator may be responsible for hiring all staff--professional and nonprofessional. However, generally these hiring responsibilities are divided.

At the secondary level, the primary hiring responsibilities are typically distributed as follows:

Who Hires	Who Is Hired
board of education	superintendent
superintendent; board	principals assistant superintendents
assistant superintendent, operations	director of student personnel services director of business affairs director of personnel director of accounting and research
director, personnel	instructional staff
director of student personnel services	nurses psychologists visiting teachers social workers counselor speech and hearing specialists
director of accounting and research	data processing personnel transportation personnel legal staff
director of business affairs	supervisor, cafeteria supervisor, building grounds supervisor, custodians publications specialist
supervisor, cafeteria	cooks
supervisor, building and grounds	maintenance foreman maintenance crew
supervisor, custodians	custodians

Generally, positions selected by lower-level administrators (directors, supervisors) must be approved upward, through channels. In other words, the personnel director recommends to the assistant superintendent that a particular teacher be hired. The assistant superintendent then recommends hiring to the superintendent who, in turn, recommends hiring to the board. This same approval-upward process occurs at the area vocational school or postsecondary level.

At an area vocational school, the hiring responsibilities are generally distributed as follows:

Who Hires	Who Is Hired
area board	superintendent
area board and superintendent	vocational director
vocational director and-- superintendent director of student personnel supervisors	 supervisors professional support staff instructors
vocational director and supervisor OR superintendent	nonprofessional staff (secretaries, custodians, cafeteria staff)

At the postsecondary level, the primary hiring responsibilities are typically distributed as follows:

Who Hires	Who Is Hired
board of trustees	president
president	academic deans (dean of occupational program; vice-president)
academic deans	department chairpersons
department chairpersons	instructors
dean (coordinator) of student support services	professional support staff
personnel director	nonprofessional staff

Assessing Staffing Needs

Your second task in preparing a foundation for staff selection is to decide--systematically and rationally--what new or additional staff are needed. This is tied very closely to program planning and budgeting. On the one hand, the following situations could suggest the need for hiring new staff:

- A staff member retires, transfers, resigns, or is let go for some reason.
- A new program is implemented.
- Enrollments in a particular program increase substantially.

While new staff could be hired in each of these situations, that is not the only option available. Budget limitations may require that no new staff be hired and that, instead, the load be redistributed among remaining staff.

Or, staff from programs that are experiencing declining enrollments could be transferred--if qualified--to the new or growing program. Finally, you could consider hiring someone, but not on a permanent or full-time basis. If the need for an additional person will not last indefinitely (in the case of just a brief surge in enrollment or the need to replace a staff member on sabbatical), then you might hire a temporary, full-time person. Similarly, the need may be continuing or recurring, but not require full-time service. For example, a new program in real estate management might involve one course per year in surveying. To fill this need, you could hire a local civil engineer on a part-time or "special" contract to teach just this one course. Even though he/she might be hired to do this every year for 20 years, he/she would still not be a permanent employee. You, as administrator, need to consider all the options before making a decision--an expensive decision--to hire.

Three bases that are typically employed in determining numbers and types of staff needed are (1) student-teacher ratios, (2) institutional goals and objectives, and (3) evaluation of the adequacy of present staffing. In the first case, an institution or district decides that an ideal learning situation involves a certain class size--for example, no more than 25 students to each teacher. It can also be determined how small a class can be (e.g., one teacher and ten students) and still be cost-effective. In that case, if only eight students enrolled, the class would not be offered. These ratios will vary, depending on the type of course and on the type of instruction (e.g., large group, individualized).

In the second case, an institution or district sets very specific educational goals and objectives and then determines the staffing needed to accomplish those goals and objectives. In the third case, evaluating present staffing numbers and patterns can alert you to the need for staffing changes: none, less staff, more staff, or different staff.

Each of these bases represents an ideal situation, however. Therefore, each reflects the type of staffing that would be best to have.

Because financial resources are often not available to assure that all needs can be met, a balance must be sought. Decisions must be made concerning what needs can be met with available resources. Only then can you determine whether the present staff is, or can (with training) be, capable of meeting student needs. It is essential to carefully consider all of these aspects of staffing criteria before deciding whether new, additional, or different personnel are needed.

You may wish to locate and review samples of personnel policies developed by a variety of educational institutions to guide their personnel practices. These can be located by checking with your resource person, local educational institutions, or perhaps the library. As you review each policy, ask yourself the following kinds of questions:

- Are relevant federal, state, and local laws and guidelines included or cited?
- Are such issues as civil rights, equity, and hiring of veterans covered?
- Does the policy include specific guidelines concerning who is responsible for hiring whom to do what?
- Is the policy clearly stated?
- Is enough guidance provided by the policy?

You may wish to arrange through your resource person to visit and interview an experienced administrator at the secondary or postsecondary level to determine what methods he/she uses to assess staff needs. Before the interview takes place, you should prepare a list of questions, such as the following, that you wish to have answered:

- What factors are considered in determining the numbers and types of staff needed?
- How are these factors weighted?
- Who is involved in determining staff needs? Who makes the final decisions?
- How are staffing needs resolved when financial resources are not adequate to meet the needs?

The following "Case Study" describes how a vocational/technical administrator established the foundations for staff selection. Read the situation and critique in writing the performance of the administrator described: what did she do correctly, what did she do incorrectly, and what should she have done instead?

CASE STUDY

Ms. Pamela Franken, as a new administrator at Jennings Vo-Tech, planned on being the "new broom that sweeps clean." Thus, she started reviewing all the institutional policies and procedures from first to last. This was a relatively easy task since there was a "Jennings Vo-Tech Operating Manual," with each operation clearly outlined. In looking up the information on hiring practices, she found the following:

> Jennings Vo-Tech is an equal opportunity/affirmative action employer, responsive to all applicable local, state, and federal laws and guidelines. Hiring is done on the basis of these laws and guidelines, and the job descriptions prepared for each position. Final hiring decisions rest with the Board.

"Well," she thought, "that's two of the three things I was looking for: compliance with the law and responsibility for hiring decisions." She still didn't know how decisions to hire staff were made, however, so she decided to talk to another administrator on staff. He told her that, when a staff member left, for whatever reason, or a new program was started, then new staff were hired--if there was enough money in the budget. Otherwise, they made internal adjustments or hired part-time staff.

Ms. Franken returned to her office and prepared an addendum for the operating manual explaining this method for determining staff needs--which she felt should have been done before. Satisfied with her review and revision of this area of operations, she moved on to the next area.

NOTES

Compare your completed written critique of the "Case Study" with the "Model Critique" given below. Your response need not exactly duplicate the model response; however, you should have covered the same major points.

MODEL CRITIQUE

Ms. Franken's efforts were admirable. She recognized the need to ensure that all operational policies were established and documented, before attempting to operate the institution. Having an operations manual available was an asset; such a device allows staff to operate from a consistent base. She was correct in the three items she sought, also: compliance with the law, specifications of responsibility for hiring, and guidelines for assessing staffing needs. And she went beyond the operations manual in seeking the information she required.

However, beyond that point, her new broom swept a good deal of effort under the carpet. Her satisfaction in finding information on each of her three designated areas ignored the fact that "information" in and of itself is not adequate. It must be good information.

Staff being told only that "applicable" laws and guidelines must be followed are not getting much help. What applicable laws and guidelines? At most, an explanation of each applicable law should be included in the procedures which accompany this policy. At least, a citation should be given for each so that concerned parties know which laws and guidelines to refer to. It is these specific laws and guidelines that define exactly what is meant by "equal opportunity/affirmative action."

The fact that the board is ultimately responsible for all hiring decisions is hardly surprising. What is needed by Ms. Franken to help persons involved in selecting and hiring staff is more specific information. Who, for example, interviews custodians? clerical staff? instructors? counselors? Who else must be involved once initial hiring recommendations are made? And so on. These responsibilities must be rationally assigned for the process to be meaningful, workable, and efficient in terms of staff time.

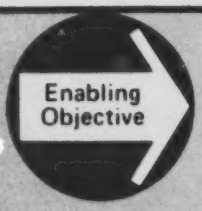
Finally, she received and documented a fairly superficial accounting of how staffing needs were "assessed." If the other administrator was telling the whole story, then the system should be reconsidered and strengthened. The leaving of a staff member may or may not require rehiring, depending on more factors than money. Shrinking enrollments, for example, may negate the need to replace the exiting staff member. In addition, budgeting, planning, and staffing should be closely related. If a new program is to be developed, funds should be allocated to meet program needs--including staff. Decisions should not be so casual as suggested by the administrator.

In short, Ms. Franken knew what key things to look for, but not what criteria to use to measure their adequacy. If she doesn't become more discriminating in her efforts, she may find herself with structure without content.

Level of Performance: Your completed written critique should have covered the same major points as the "Model Critique." If you missed some points or have questions about any additional points you made, review the material in the information sheet, "Foundations for Staff Selection," pp. 9-17, or check with your resource person if necessary.

Learning Experience II

OVERVIEW



After completing the required reading, develop a job description for a given position.

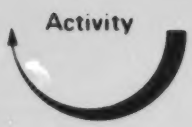
You will be reading the information sheet, "Establishing Selection Criteria," pp. 25-35.

You will be developing a job description for a given position.

You will be evaluating your competency in developing a job description for a given position, using the "Job Description Checklist," pp. 37-38.

You may wish to review sample job descriptions.

NOTES



Once you know what positions need to be filled, you need to decide what criteria you will use to measure prospective candidates for each position. For information about the questions to consider when establishing selection criteria, read the following information sheet.

ESTABLISHING SELECTION CRITERIA

What characteristics should a good instructor (guidance counselor, custodian, librarian, reading specialist) possess? This is a complex and extremely vital question. The decisions you make in establishing selection criteria at this point determine the effectiveness of all of the steps that follow. These criteria should also be used as a basis for evaluating staff performance once on the job.

In keeping with the institution's personnel policy statement, one criterion might be that--all other things being equal--preference will be given to persons who are female or represent a minority group.

In addition, job-related characteristics must be delineated. These will vary somewhat depending on the institution and the position being considered. However, generally, they will involve the following areas:

- Educational background
- Past work experience
- Skills required

In the case of a secretary, for example, you may decide that he/she should be a graduate of a business program at a secondary or postsecondary school, and/or have two years experience on the job. Because of the nature of this specific position, you could list the skills required as being the following:

- Ability to type 65 words per minute
- Good interpersonal skills (dealing with students, teachers, parents, etc.)
- Ability to operate duplication machines
- High level of organization
- Pleasant telephone voice
- High tolerance for confusion
- Good filing and record-keeping skills

In other words, you need to consider what that person will be expected to do and be on the job, and to specify those things in writing. Sources such as

the Dictionary of Occupational Titles (DOT) can help give you a general idea of the skills and characteristics a secretary should be expected to have, but you need to go beyond that to your specific situation. There are good sources that you can tap for this. You can ask incumbents to list what they do--all that they do. If the last secretary was dismissed, why was she/he dismissed--what essential skills or characterisics were lacking? If the last secretary left because she/he was unable to cope with some aspects of the job, what qualities are needed to enable a person to cope?

With instructional staff, these specifications are more elusive. There is no universal agreement on what makes a good teacher. The following are some questions you could ask in determining teacher-selection criteria:

What Background (Education and Experience) Is Required?

In the case of vocational teachers at the secondary level, this will probably involve certification (emergency, provisional, permanent) and a certain number of years of experience in the trade or occupation. For most vocational subject areas, certification is given based on completion of a bachelor's degree, which included (1) course work in basic studies, in the occupational area, and in education, and (2) a period of student teaching. In areas such as dental hygiene, nursing, and cosmetology, a license to practice is required. T & I teachers, on the other hand, may come straight from industry, with emergency certification status. In such cases, you need to set criteria that consider this reality. For example, how many years of work experience has the candidate had? How successful was he/she? Did he/she conduct any on-the-job training?

This latter situation is similar to that at the postsecondary level, where certification is not required in most cases. In delineating the background criteria required for postsecondary instructors, you will probably need to place more emphasis on such areas as advanced degrees, experience in the field, experience in teaching, and memberships in professional organizations.

What Specific Skills Are Required?

The curriculum will suggest the areas in which the instructor must be skilled. What will this instructor be expected to teach? The instructor who is equally skilled in all aspects of the occupational area probably does not exist. You need to determine skill areas based on the content of the courses to be taught.

Interpersonal skills are also important to teaching. Can the instructor relate to students, administrators, colleagues, support staff, and parents (at the secondary level)? How important is his/her ability to relate to each of these groups? In some situations, being able to relate to students well may suffice; contacts with others may be infrequent. However, if there is a team teaching situation or the instructor will also serve as a department

head, being able to build relationships with peers--with colleagues--is crucial also.

Supplementary skills may also be needed. The teacher of agriculture, for example, may also need to be willing and able to organize and operate a Future Farmers of America club. Or head up a schoolwide debating team. Or serve as advisor to the student government organization. Or coach the chess club. These may be required duties or voluntary activities, but they do require additional skills.

What Other, Personal Characteristics Are Desirable?

You may decide that certain other qualities are important to the role of instructor, for example:

- Flexibility
- Creativity
- Sincerity
- Stability
- Patience
- Problem-solving ability (good judgment)
- Verbal ability (orally and in writing)
- Commitment
- Respect for authority
- Physical fitness
- Physical appearance (neat, unextreme)

What Can You Afford?

The budget will affect the criteria. Given a tight budget, you may need to seek candidates who are qualified and promising, but inexperienced. Beginning teachers cost less than those with a great deal of experience and a proven "track record" of success.

In addition, a tight budget may necessitate your seeking candidates with dual certificates or licenses or college majors. You may need to hire a teacher who can teach both some business courses and some English courses, for example.

Neither of these situations is designed to create a situation in which you settle for less than is required. You are still seeking excellence; you are merely limiting the search to within your budgetary constraints.

Evaluating the Criteria

Once the tentative criteria have been listed for a given position, they should be checked for appropriateness and practicality. In reviewing each criterion, several questions should be asked, as follows:

- Is the criterion, in fact, consistent with the letter and the spirit of guidelines provided in the personnel policy statement?
- Is the criterion really necessary for the job? (And, were all important criteria included?)
- Is the criterion measurable? This is very important, especially with criteria related to personal characteristics. If you specify that the candidate must be "capable of growth," can you realistically get evidence of that quality during the information-gathering step (e.g., through applications, letters of reference, interviews)?
- Is the criterion practical? In other words, does it describe a position for which there will be candidates available, and that the institution can afford to fill.
- Finally, are there a reasonable number of criteria? There need to be enough to adequately define the position. However, there should not be so many that it is impossible to keep track of them all as you review candidates.

Who Answers These Selection Questions?

It was already mentioned that you can answer these questions in part using sources such as the DOT and that incumbents can be used to provide descriptions of their jobs. One approach to analyzing a position is as follows:

- Part of the analysis concerns skills and characteristics that are part of the general nature of the job (e.g., teacher) regardless of the particular subject taught. Consequently an ad hoc committee of teachers, supervisors, and administrators could meet to discuss and outline this section.
- Part of the analysis concerns skills and characteristics that are unique to the specific position being described (e.g., home economics teacher or machinist instructor). Thus, further analysis is necessary.

In the case of existing positions, incumbents can meet, discuss the related items, and outline responses based on what their jobs actually entail. For example, all the teachers in the business and office department--together with their department head, supervisor, and principal--could meet to prepare position analyses related to their department. However, analyzing the status quo alone is not sufficient. The position analysis should go beyond what is done to what should be done. This is why it is preferable to involve several

persons in the analysis process: what one business teacher is doing and has done for years may not be the ideal performance sought.

To analyze a new position, a slightly different procedure may be required. The same persons could be involved, but they probably need to use outside resources to determine exactly what characteristics are required for the new position. This help can come from persons outside the institution who are employed in the type of position being considered. Employers could also help. An employer who hires people in the area for which this teacher will be offering training will know what aptitudes and skills the employees must possess--which, therefore, the teacher will need to be able to teach. The printed resources available are also helpful. The state department of education may have relevant information, including information in the state plans or existing job descriptions (see sample 4). Looking up the occupational area (e.g., word processing) in the DOT will also offer some help in defining the skills needed by the teacher.

Another approach, mentioned previously, is to analyze the positions based on the courses of study for each program, which should have been developed with the assistance of the advisory committee(s). Advisory committee members could, of course, review completed position analyses developed using other means, also.

Job Descriptions

The usual mechanism for documenting the criteria for each position or position-type is the job description. The job description should clearly outline the expectations that the institution has for the person who is ultimately hired for a position. The purpose of a job description is to identify each position--to accurately describe the minimum qualifications, major duties, and responsibilities, and to provide an objective basis for the selection or rejection of applicants. It also becomes a basis for the evaluation of job performance.

Job descriptions should exist for each position or position-type in the institution. If not, you (and the staff in the personnel department) will need to prepare these descriptions. If a new position is created, a new job description will need to be developed.

A complete job description (see samples 5 and 6) identifies, in specific format, the functions, responsibilities, and duties expected of the potential employees. It documents, for the mutual benefit of the employer and the employee, the basic duties and responsibilities of the position as an aid in determining the qualifications needed by a person to be assigned to that position.

Securing Necessary Approval

The final step to be taken before beginning recruitment is to obtain formal approval for recruitment from your chief administrator or your governing board. Sample 7 is an illustration of a typical completed personnel request form. In some cases, it may be required (or politic) to secure the approval of the union representative, also.

Once this final hurdle is passed, the fruits of your labor will begin to pay off. You have established clear needs for additional personnel and have carefully projected the type of job to be filled. You will find that this planning will help you make more objective decisions in the selection process.

SAMPLE 4

STATE-DEVELOPED JOB DESCRIPTION
DIRECTOR OF VOCATIONAL EDUCATION

NATURE OF WORK

The vocational education director develops, administers, and coordinates the local vocational education program as an integral part of the total instructional curriculum in accordance with the state plan for vocational education and the policies of the local and state boards of education. Directives of this employee are implemented through the maintenance of cooperative relationships with principals and other school administrators. The director provides guidance and direction to all vocational personnel. The overall effectiveness of vocational education is the responsibility of the director. The work is independently performed, under the general supervision of the superintendent or designee.

ILLUSTRATIVE EXAMPLES OF WORK

Administration

- Maintains current knowledge of vocational education and of new and impending legislation to ensure compliance with external regulations, and to communicate pertinent information to the board of education, superintendent, and vocational staff.
- Develops a comprehensive long-range plan that details goals, objectives, and strategies, with supportive data of employment area needs, student interests, and necessary fiscal support.
- Prepares annually an operating plan for the next year, specifying curriculum, enrollment, and budgeting of resources.
- Modifies budgets as program demands and categorical funding changes occur, with adjustments that retain proper balance among various program areas as needed locally.
- Establishes procedures for receipt and expenditures of funds in compliance with local, state, and federal policies and regulations.
- Formulates and effects procedures for acquisition and inventory control of equipment and materials.
- Determines priority and best sources, and authorizes or purchases instructional materials and equipment within limitations of the current budget.
- Institutes procedures and monitors activities for the acquisition of properties for live projects and the disposition of products resulting therefrom.
- Designs and installs a system of varietal data collection.
- Compiles and analyzes data to prepare reports to local, state, and federal agencies, and for planning and evaluating vocational programs.
- Confers with appropriate staff to ascertain student enrollment, number and kinds of positions needed, and assignment of duties, as required by state and local regulations.
- Develops and recommends policies to the board to govern personnel and program activities.

SOURCE: North Carolina State Department of Education, Raleigh, North Carolina.

Instruction/Curriculum

- Recommends to the local administration courses of study to be initiated, curtailed, expanded, or dropped for vocational students or adults, based on information obtained through review of publications; evaluation of current offerings; surveys of local businesses, students, and school personnel; and input from advisory councils.
- Adapts state curriculum guides to local use and revises on a continuing basis, with input from local advisory councils.
- Designs specifications for equipment, facilities, and safety standards to accommodate each course of study, with the assistance of appropriate specialists as needed.
- Plans and develops special programs for target groups and secures supportive endorsement and funds to conduct these programs.
- Meets individually and in groups with principals, vocational counselors, and teachers to provide vocational information to assist in orientation and registration of students.
- Promotes active participation of teachers and students in student vocational organizations.
- Evaluates the effectiveness of vocational training and guidance through the follow-up of students.

Personnel

- Defines specific characteristics needed by any employee in individual vocational positions.
- Maintains contacts with potential teacher sources.
- Ascertains eligibility for certification, processes supportive documents, and assures compliance by assisting the individual in obtaining any additional required experiences.
- Recommends individual applicants and employees for selection and assignment.
- Determines needs, plans, and presents orientation and inservice training for new and experienced personnel.
- Identifies appropriate criteria for the evaluation of the performance of vocational personnel.
- Conducts on-site observations to review the performance of all vocational personnel.
- Informs individual vocational staff members of changes needed and alternatives that will improve their instructional/guidance methods; use of facilities; and relationships with students, staff, and the public.

Public Relations

- Promotes image of vocational education with news media and civic organizations, through speeches and written communication.
- Meets and consults with advisory groups and governmental agencies, and serves on various external committees to acquire relevant information and support of the vocational education programs.
- Searches for and establishes cooperative relationships with labor, business, and industry.
- Locates and utilizes sources of professional assistance to the local programs.
- Arranges and directs public presentations by vocational students and staff.

SAMPLE 5

JOB DESCRIPTION: TEACHER

Position Title: Business and Office Education Teacher

Primary Function

The business and office education teacher is responsible for teaching students to work in office settings, particularly in the use of word processing equipment.

Major Responsibilities and Duties

1. Gives leadership to organizing the curriculum for teaching word processing equipment operation.
2. Teaches all students interested in learning the skills to operate word processing equipment.
3. Cooperates with other teaching staff in planning the overall office education program.
4. Assists in coordinating advisory committee meetings.
5. Assists in coordinating the student vocational organization.
6. Performs other duties as may be assigned him or her by the business and office education supervisor.

Qualifications

1. Education: A bachelor's degree in business and office education.
2. Credentials: Vocational certification by the state department of education is required.
3. Experience: Previous teaching experience in a vocational school is required. A minimum of three years of actual work experience in an office setting is also required by state regulation.
4. Required Skills: Expertise in using and teaching word processing equipment is required.
5. Personal Characteristics: Demonstrated ability in leadership, persistence, and ability to work cooperatively with other teachers and employers of office workers is required.

Salary

Between $_____ and $_____, depending upon experience and qualifications.

SAMPLE 6

JOB DESCRIPTION: SECRETARIAL

Position Title: Word Processor Operator

Primary Function

The word processor operator is responsible for preparing all reports, charts, correspondence, and other materials in which the word processing equipment is used.

Major Responsibilities

1. Prepares drafts of materials from notes and verbal directions.
2. Prepares final copy of materials, adding or deleting information as necessary.
3. Sets up and maintains files of materials prepared on the word processing equipment, keeping tapes when appropriate.
4. Assists professional staff in learning the utility of word processing equipment to streamline paperwork flow.

Qualifications

1. Education: Completion of a vocational office education program is required as well as evidence of training in the use of word processing equipment.
2. Experience: Previous job experience using word processing equipment in an office setting is required.
3. Required Skills: Expertise in the use of word processing equipment is essential. The ability to use dictating equipment is also required.
4. Personal Characteristics: Demonstrated organizational ability and ability to work cooperatively with others is required.

Salary

Between $_____ and $_____, depending upon experience and qualifications.

SAMPLE 7

PERSONNEL REQUEST FORM

SOUTHWEST SCHOOL DISTRICT
Office of Personnel Services

After completing this form in full, submit it to the Office of Personnel Services.

Position Title Auto Mechanics Instructor Department Vocational Education

Position Supervisor G. T. Adams Budget Account 823A

Proposed Salary Range $12,500 to $14,000 Date Required 9/1/81

Type of Appointment: (Check one box) ☐ Administrative ☒ Instructional ☐ Classified Civil Service

THE POSITION TO BE FILLED IS:
(Check applicable boxes below)

☐ A previously authorized new position

☒ A vacant position: the former incumbent of the position was Dan Jones

☐ A temporary position (From: _____ To: _____)

☐ A part-time position (_____ FTE)

☒ A full-time position (100% FTE)

List the minimum qualifications below (indicate the level and/or field of education or equivalent experience; special knowledge or skills; special hours required; shift schedule, etc.)

B.A. degree preferred. Seven years experience as auto mechanic required. Experience with foreign cars is necessary. Hours are 8-5 Monday through Friday.

Briefly describe below the major duties and responsibilities of the vacant or new position.

Classroom and shop instruction in all phases of auto repair with exception of automatic transmissions. Maintain inventory of repair parts, be responsible for billing, payment, and department bookkeeping.

Approved: Department Head _____ Date _____

Director (or representative) _____ Date _____

FOR OFFICE OF PERSONNEL SERVICES ONLY

Date Received _____ Date Posted _____ Position Reference Number _____

Office of Personnel Services Copy

Develop a complete job description for one of the following situations:

- If you are situated in an actual secondary or postsecondary institution, you can develop a job description for a position in the institution for which a job description (or current job description or adequate job description) does not presently exist.
- If you are situated in a university setting, you can develop a job description for a university position (e.g., a departmental secretary) or for the administrative position you ultimately hope to hold.
- Your resource person may specify a particular position that your job description should cover.

After you have developed your job description, use the "Job Description Checklist," pp. 37-38, to evaluate your work.

Name _____

Date _____

JOB DESCRIPTION CHECKLIST

Directions: Place an X in the NO, PARTIAL, or FULL box to indicate that each of the following performance components was not accomplished, partially accomplished, or fully accomplished. If, because of special circumstances, a performance component was not applicable, or impossible to execute, place an X in the N/A box

	LEVEL OF PERFORMANCE			
	N/A	No	Partial	Full
1. The job description includes information concerning:				
a. the title of the position.....	☐	☐	☐	☐
b. the primary function of the person who fills that role.....	☐	☐	☐	☐
c. the major responsibilites and duties involved.....	☐	☐	☐	☐
d. the educational preparation required.....	☐	☐	☐	☐
e. previous experiences required.....	☐	☐	☐	☐
f. skills required (technical, interpersonal, supplementary).....	☐	☐	☐	☐
g. the salary range for the position.....	☐	☐	☐	☐
2. The job description provides criteria that are:				
a. consistent with personnel policies.....	☐	☐	☐	☐
b. really necessary for the job.....	☐	☐	☐	☐
c. measurable.....	☐	☐	☐	☐

	LEVEL OF PERFORMANCE			
	N/A	No	Partial	Full
d. practical.....	☐	☐	☐	☐
e. reasonable in number.....	☐	☐	☐	☐
3. The job description clearly outlines the expectations that the institution has for the person who is ultimately hired for that position.....	☐	☐	☐	☐

Level of Performance: All items must receive FULL or N/A responses. If any item receives a NO or PARTIAL response, review the material in the information sheet, "Establishing Selection Criteria," pp. 25-35, revise your job description accordingly, or check with your resource person if necessary.

You may wish to locate and review sample job descriptions for a variety of staffing levels. These can be located by checking with your resource person, local educational institutions, state education department, or the library. As you review each job description, you may wish to use the items on the "Job Description Checklist," pp. 37-38, to rate its adequacy.

Learning Experience III

OVERVIEW

After completing the required reading, critique the performance of an administrator in a given case study in recruiting candidates to fill a position.

You will be reading the information sheet, "Recruiting Candidates," pp. 41-46.

You may wish to interview an experienced administrator to determine what methods he/she uses to recruit candidates.

You will be reading the "Case Study," p. 47, and critiquing the performance of the administrator described.

You will be evaluating your competency in critiquing the administrator's performance in recruiting candidates by comparing your completed critique with the "Model Critique," p. 49.

NOTES

Activity

How can you ensure that the most qualified candidates are aware of and apply for the positions you have open? How can you be sure that you are reaching those you wish to hire? For information on how and where to focus your recruitment efforts, read the following information sheet.

RECRUITING CANDIDATES

To recruit candidates for nonprofessional or noninstructional positions (clerical, custodial, cafeteria, etc.), normal community channels can be used: in-house posting, word of mouth, employment agencies, and classified ads in the newspaper.

Recruitment of professional staff requires a different approach. First, it should be noted that the job market is such that, for some areas, the institution will receive innumerable unsolicited applications. Or, there may be someone in-house who deserves the job. These situations do not nullify the need to recruit. If you are to ensure that you are meeting federal guidelines for providing equal opportunity, you must adequately publicize each available position.

In some technical areas, wide publicity will be a necessity because instructors are in short supply. As one educator said, "just try to locate agriculture and machine trades teachers currently."

There are a number of ways to facilitate recruitment by (1) the contacts built, and (2) the materials prepared. Of course, one fundamental recruitment device is to have an institution that is known for having attractive conditions: good salaries, good fringe benefits, differentiated staffing, humanistic leadership practices, opportunity for experimentation, and so on.

Contacts to Build

Teacher training institutions should be a prime target. This means developing and maintaining regular contact with appropriate persons at each institution identified. Certainly institutions located in the immediate area or within the state should be contacted. However, it is important to tap outside sources, also, to ensure a balanced and varied staff. You or personnel staff may also need to identify institutions that prepare teachers in specialized areas--teachers who are normally difficult to locate.

These teacher training institutions need to be kept informed about both your institution and any vacancies available. Their placement officers can be sent materials and invited to visit the institution or district. This is a normal process to follow; you provide them with material or information and hope that it filters down to the prospective teachers. You can conduct a more

active recruitment campaign by going directly to the prospective teachers. An administrator, recruiter, personnel staff member, or teacher from your institution can go to the campus of the teacher training institution to participate in campus career days, set up a temporary recruitment center, or speak to a class. If you are seeking a particular "type" of teacher (female, minority group member), you could send a teacher of that type to do the recruiting.

Employment agencies, especially those specializing in teachers or educators, are another source. Persons at these agencies need to be contacted regularly to build good relationships, and they need to be sent up-to-date materials and information.

Other sources to consider are employers, community organizations, union officials, and friends. Especially in the technical and industrial areas, these may be your best sources for prospective teachers. Appropriate staff at your institution need to make sure such people are kept informed of vacancies you are trying to fill. The person operating a local TV repair shop just may be your next electronics teacher.

Other Places to Post Vacancies

There are several other places where vacancy notices can be posted. Your own staff or student teachers (if you have such) need to be notified and have the opportunity to apply. You should, therefore, post a notice on your own institution's bulletin board or in its newsletter. You can also have the notice sent to other secondary and postsecondary institutions in the area. Ads can be placed in local newspapers, major newspapers sold nationally (e.g., the New York Times), professional newspapers (e.g., Chronicle of Higher Education), and professional journals serving the area in which the vacancy has occurred.

Materials and Information to Provide

In general, three types of information should be provided to your recruitment contacts: information about (1) the institution or specific programs, (2) the vacancies available, and (3) your satisfaction with the performance of persons previously hired through that source.

Institutional/program information can, of course, be provided in person or by telephone. It is, however, most efficient to also provide printed information for placement persons, teacher trainers, and prospective teachers to refer to. Brochures or fliers can do the job nicely. Most important is to update these materials regularly as needed and to send copies of any new materials to your employment sources.

The device most often used to provide information about job openings is the position vacancy notice. This is generally simply a compilation of the

information from the job description and the personnel request form--often in an abbreviated fashion--as follows:

Position Information

- Position title
- Institution hiring
- Starting time (date position available)
- Full- or part-time
- Length of position (if it is a temporary position; e.g., as a result of a two-year government grant)
- Salary range or conditions

General Information (optional)

- Brief description of institution
- Brief description of program

Position Description

- Primary function
- Major responsibilities and duties
- Qualifications: education, credentials, experience, required skills, personal characteristics
- Additional comments

Application Directions

- Who to contact (name, address, phone number)
- What to send (e.g., application, resume, transcript)
- Last date applications will be accepted

Equity Statement

- "An equal opportunity, affirmative action employer," for example

Sample 8 shows an example of a position vacancy notice. Brevity is important if you want candidates to bother to read the notice, but it is equally important to provide all key information.

The development of a classified advertisement requires a special talent. One must include the key information, while keeping the ad as brief as possible. There needs to be enough information to ensure that the right candidates--the qualified candidates--apply, but space is limited. The following

two classified ads from the Chronicle of Higher Education are examples of the typical length and content of such ads:

Secretarial Science: Central Wyoming College seeks applications for a one-year instructional position in secretarial science. Applicants should have a bachelor's degree with formal preparation in secretarial science as well as successful teaching and work experience. Salary dependent upon qualifications. Starting date is August 24, 1981. Applications must be received by June 12, 1981. Include résumé of work experience, educational background and three current letters of recommendation. Apply to Patricia Sturdevant, Personnel Officer, Central Wyoming College, Riverton, Wyoming 82501. CWC is an Equal Opportunity Employer.

Secretarial Science: Instructor/Visiting Lecturer—Department of Secretarial Science wishes to attract 1 visiting lecturer for the Fall Semester 1981. Master's Degree in Business Education required. Teaching experience in self-paced instruction in Typing, Gregg, Medical, Legal, and Administrative Shorthand, Accounting, and Word Processing. Relevant business experience and teaching experience at a community college highly desirable. Salaries highly competitive. Applications must be received by June 8, 1981. Send résumés to: Ms. Marijean Harmonis, Department Head, Department of Secretarial Science, Community College of Philadelphia, 34 South 11th Street, Philadelphia, Pennsylvania 19107. Affirmative Action, Equal Opportunity Employer.

The third type of information to be provided is in the nature of feedback. If you have hired staff through a particular institution or agency, you need to be sure that they are informed about how well those staff are performing on the job. If they are recommending (or even training) persons who are not performing adequately on the job, they need to know this so they have the opportunity to rectify the situation. On the other hand, they will appreciate a verbal pat on the back if your new-hire turns out to be top-notch.

SAMPLE 8

POSITION VACANCY NOTICE

Guilford Technical Institute
Jamestown, North Carolina 27282
January 26, 1981

[An Affirmative Action/Equal Opportunity Institution]

DEAN OF ADMINISTRATION

Applications are invited for the position of Dean of Administration.

THE INSTITUTION

Guilford Technical Institute (GTI), one of the largest of the 58 units in the North Carolina System of Community Colleges and Technical Institutes, is located in Guilford County. Its main campus is in Jamestown, and two additional centers are located in the neighboring cities of Greensboro and High Point. GTI serves a countywide population of more than 320,000 residents. Its annual enrollment exceeds 7,000 curriculum students, and an additional 25,000 persons are enrolled in extension courses. A growing, forward-looking institution, the school employs approximately 300 full-time staff members and offers more than 44 certificate, degree, and diploma programs.

POSITION DESCRIPTION

The dean of administration is the chief officer for administrative and support services. Reporting directly to the president, the dean serves as the chief executive of GTI in the absence of the president.

Five administrative directors report directly to the dean. They are the directors of personnel/compliance; public instruction; development, research and planning; physical plant and security; and administrative data processing.

The dean is responsible for personnel management, including recruitment and selection of employees; federal-state compliance activities; institutional policies and procedures; evaluation and goal-setting. He/she must provide leadership for developing a high-quality marketing plan and for maintaining effective public relations. Other responsibilities include institutional planning, procurement of external funding, and conducting practical research. This administrator will manage construction projects, physical plant operations and campus security; and will develop, implement, and supervise an information system to provide broad, economical, high-quality computer services. He/she will function as the legal representative for the institution and will work closely with GTI's attorneys, with various compliance agencies,

boards of education, and legislative bodies. The dean will also play a vital role in developing a systematic budgeting process for the institution.

QUALIFICATIONS

GTI seeks an individual of proven administrative ability to assume the leadership role in management of its administrative services. The successful candidate must be philosophically committed to the comprehensive community college concept. He/she must have demonstrated skills, knowledge, and experience in all areas of responsibility indicated in the position description.

EDUCATION/DEGREE REQUIREMENTS

Minimum of master's degree in management/business administration, or doctorate in higher education or vocational education administration. Educational preparation should reflect a strong background in personnel administration, business and school law, budget preparation and control, contract management, computer science, and public relations.

EXPERIENCE

Minimum of eight to ten years of administrative experience, with five of those years in top-level administrative position(s).

SALARY

Range of $31,000-$34,000

APPLICATION DEADLINE	APPOINTMENT DATE
March 27, 1981	July 1, 1981

APPLICATION PROCEDURES

Submit a letter of application, complete resume, and academic credentials; have three current letters of recommendation sent to--

Director of Personnel
Guilford Technical Institute
POB 309
Jamestown, North Carolina 27282

We will confirm receipt of your letter and resume by sending you a GTI application for employment to be completed and returned to the above address.

You may wish to arrange through your resource person to visit and interview an experienced administrator at the secondary or postsecondary level to determine what methods he/she uses to recruit candidates. Before the interview takes place, you should prepare a list of questions, such as the following, that you wish to have answered:

- What channels are normally used in announcing various positions?
- What special channels are used? Why? When?
- With whom do you maintain contact for the purpose of recruitment? How are these contacts built and maintained?
- What materials and information do you provide to promote recruitment?
- Do you have sample position vacancy notices I can review?

The following "Case Study" describes how a vocational/technical administrator recruited candidates to fill a position. Read the situation and critique in writing the performance of the administrator described: what did he do correctly, what did he do incorrectly, and what should he have done instead?

CASE STUDY

Mr. Ed Bertucci was a seasoned administrator, and he knew how to make the system work. When one of his electronics instructors retired, Mr. Bertucci was prepared. He had his secretary pull the job description for the position and all the relevant files of applicants that had been accumulating in his well-kept active files. He was pleased to find that there were several excellent prospects represented there. Half his work was done.

Consequently, he sent letters to these applicants announcing that a position was open and asking them to notify his office if they were still available and interested. He spent a lot of time on the letters. He was a persuasive writer, and he worked to sell the school, which was well-known to offer good salaries, benefits, and working conditions. He also included a colorful new brochure about the school and community.

Pleased with his efforts, he sat back to await the responses.

NOTES

Compare your completed written critique of the "Case Study" with the "Model Critique" given below. Your response need not exactly duplicate the model response; however, you should have covered the same major points.

MODEL CRITIQUE

We wish Mr. Bertucci luck, but his wait may be a long and futile one. Keeping well-organized files and being a persuasive writer probably won't be enough to do the job needed. Those two skills, while useful, are only part of the total effort required. It would not be surprising if those "excellent prospects" were no longer available. It is rare for a candidate to notify all contacts that he or she has gotten a job. More crucial, however, assume one or more of those prospects--all white males--were available, and one was eventually hired. Mr. Bertucci would be hard put to prove that equal opportunity employment was alive and well and living in his school.

Mr. Bertucci should have done exactly as he did. But in addition, he should have posted and advertised the position: in school, in local electronics firms, and so on. He should have a system of contacts--employment agencies, employers, educational institutions--that could be notified of the vacancy. Only by publicizing the position adequately can he be sure of both results and equity.

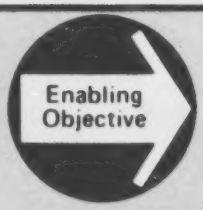
In short, Mr. Bertucci should have used his excellent verbal powers of persuasion to prepare a position vacancy notice and to alert and attract a wider audience.

Level of Performance: Your completed written critique should have covered the same major points as the "Model Critique." If you missed some points or have questions about any additional points you made, review the material in the information sheet, "Recruiting Candidates," pp. 41-46, or check with your resource person if necessary.

NOTES

Learning Experience IV

OVERVIEW



After completing the required reading, critique the performance of an administrator in a given case study in gathering and screening information concerning a candidate.

You will be reading the information sheet, "Gathering and Screening Information Concerning Candidates," pp. 53-74.

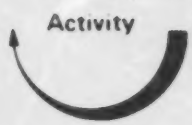
You may wish to review sample devices for gathering information about candidates.

You may wish to interview an experienced administrator to determine what devices he/she uses to gather information about candidates and how that information is screened.

You will be reading the "Case Study," pp. 75-78, and critiquing the performance of the administrator described.

You will be evaluating your competency in critiquing the administrator's performance in gathering and screening information concerning a candidate by comparing your completed critique with the "Model Critique," pp. 79-80.

NOTES



You know who you wish to hire (e.g., a counselor), and you know what criteria this person should possess. How, then, do you determine if the candidates who apply meet those established criteria? Information is needed. For information about how to gather and screen information about prospective employees--what devices and techniques to use--read the following information sheet.

GATHERING AND SCREENING INFORMATION CONCERNING CANDIDATES

As an administrator with responsibility for selecting personnel, you have two basic tasks to perform. First, you must determine what information-gathering devices will be used for which positions. The following devices are generally used to gather information about prospective staff:

- Application form
- Letter of application
- Resume
- Certificates and licenses held
- Recommendations
- Performance records
- Tests
- Interviews

Second, you must prepare, or arrange for the preparation of, the necessary devices and techniques. Application forms may need to be developed and reproduced. Tests to be required must be selected. Interview procedures should be established and interviewers selected and, if necessary, trained.

Professional/Instructional Staff

Application Form

The application form should be designed to elicit from candidates all the basic information about their qualifications so it can serve as an initial screening device. Generally included are items concerning the following (see sample 9):

- Personal background (e.g., name, address, social security number)
- Educational preparation (e.g., schools attended, degrees earned)
- Job experience (e.g., places of employment, positions held, responsibilities, names of immediate supervisors)
- References (e.g., names, addresses, phone numbers)
- Certification (e.g., certified or certifiable, what kind, what area)

SAMPLE 9

APPLICATION FORM

Picture Not Required Until After Appointment

Name of School

Address

City State Zip

I. Personal Background

Name _____ Date _____

Present Address _____
Street and Number

_____ Telephone ( )
City State Area Code

Permanent Address _____
Street and Number

_____ Telephone ( )
City State Area Code

Social Security Number _____

II. Educational Preparation

	Name/Address	Date of Graduation	Degree Received
Elementary School			
High School			
Trade or Technical School			
Junior College			
Colleges or Universities			

NOTE: This application form should be accompanied by an official transcript showing complete academic record of all work beyond high school.

What do you believe to be the primary objectives of education in the United States today? (List briefly.)

_____

_____

_____

_____

_____

_____

III. Job Experience

Teaching Experience:

1. Place _____ Address _____

_____

Superintendent _____

Dates Involved _____ Total Months _____

Grades Taught _____ Subjects Taught _____

Annual Salary _____ Number Teachers Employed _____

2. Place _____ Address _____

_____

Superintendent _____

Dates Involved _____ Total Months _____

Grades Taught _____ Subjects Taught _____

Annual Salary _____ Number Teachers Employed _____

Occupational Job Experience:

1. Place _____ Address _____

_____

Supervisor _____

Position _____

Responsibilities _____

2. Place _____ Address _____

_____

Supervisor _____

Position _____

Responsibilities _____

3. Place _____ Address _____

_____

Supervisor _____

Position _____

Responsibilities _____

4. Place _____ Address _____

_____

Supervisor _____

Position _____

Responsibilities _____

Military Experience: Yes __ No __ Number of Months _____

IV. Teaching Preference

Regular __ Substitute __

Please place a check in the appropriate blank indicating the type of institution in which you wish to be assigned.

__ High School
__ Area Vocational School
__ Trade or Technical School
__ Junior or Community College

List the subjects you are certified to teach in the order of your preference.

1st _____ No. Semester Hours _____
2nd _____ No. Semester Hours _____
3rd _____ No. Semester Hours _____
4th _____ No. Semester Hours _____

V. Certification

For what level(s) are you certified? _____

For what subject(s) are you certified? _____

What type of certification do you hold (e.g., 4-year provisional, 8-year provisional, permanent or life)?

_____

Certificate Number _____ Date of Expiration _____

If you do not hold a certificate, have you made application for same? ___ Yes ___ No

VI. References

Give the name of the college or university placement officer at the placement office where you are registered or the name of your college supervisor of student teaching. Also, give the names of superintendents and principals at the schools in which you most recently held positions.

	Name	Official Position	Address
1.	_____	_____	_____
			_____
2.	_____	_____	_____
			_____
3.	_____	_____	_____
			_____

The application usually also states, if applicable to the position, that the applicant should arrange to have college transcripts forwarded, and it may include an essay question designed to determine the applicant's views toward some facet of education. Sometimes, an autobiography is requested.

One additional item, which is sometimes included on the application form, concerns how the applicant happened to apply for a position at that particular institution. Referred by a friend? Referred by an agency? Newspaper ad? Posted notice? Other? By asking such a question, you can determine what recruitment techniques are or could be most effective.

Your institution certainly need not start from scratch in developing an application form. Examples abound. You could start by getting samples from schools, businesses, and industries locally. By reviewing these, you can get good ideas for how your own should be designed. A few guidelines should be followed as you prepare this form, as follows:

- Ask questions covering only bona fide occupational qualifications (BFOQs)--It is illegal to ask questions (sex, race, marital status) that have no relevance to the candidate's ability to do the job.
- Provide adequate, clearly and simply stated directions--If you want the applicant to print or use pen, say so. If you want the job experiences for only the last ten years, or only related to the position sought, or listed in a particular order, say so. Make sure each question or item provides enough information that the applicant knows what is being asked for. One way to ensure that this is so is to pilot test the form with a group of people before you print the final versions.
- Design a simple and pleasing format--Content is not the sole concern in designing a form. The format can make an enormous amount of difference to the person trying to fill out the form (and to the person trying to review a completed form). Make sure enough space is provided for each response. Don't cram too much into a small space, making it hard to read. Forms are sometimes designed with the chief criterion being that all information fit onto the two sides of a single sheet of paper. That's not an adequate criterion. The form needs to be readable and usable. Nothing is more frustrating than being asked on a form to fit a five-inch response into a one-inch space.

When an applicant completes and submits this form, you should be able to tell a good deal about his/her qualifications and overall skills and abilities. The information goes beyond the responses provided; also important is how the applicant completed the form. What is important will vary depending on the job sought, but the questions you should be asking yourself are the following:

- Is the handwriting neat and legible?
- Is the spelling accurate?

- Were directions followed?
- Was all required information provided? If not, this may indicate carelessness or a desire to hide certain information.

The prospective professional staff member whose completed form is incomplete and sloppy, whose words are misspelled, and whose responses do not comply with the directions given is probably not a good candidate.

In regard to the actual responses given, you should be able to tell if the candidate possesses the credentials, experience, and education required for the position sought. For example, you will know if the prospective secondary teacher (1) has a degree with a major or minor in education, (2) has any teaching experience, and (3) is or can be certified in your state.

Letter of Application/Resume

The informed applicant will supplement his/her application with a letter of application and a resume. The letter of application generally is the first point of contact. The applicant uses this letter (1) to introduce him/herself, (2) to indicate the sort of position he/she is seeking and what has attracted him/her to your institution, and (3) to request an application and further information.

The resume is a short summary of an applicant's qualifications. It most often covers the same sorts of information as required on the application form. However, the resume allows the applicant to decide which information to provide and in what order so as to put his/her best foot forward. It allows him/her, for example, to include additional relevant experiences not asked for in the application form.

What can you tell about the applicant from these two items? To a certain extent, you can tell that this person has taken the time to determine the right way to apply for a job--that the person is earnest and desires to be thorough. You can also learn additional information about the applicant's background, experiences, training, and reasons for applying for the job. And, once again, the quality of the items--neatness, spelling, sentence structure, organization--can tell you more about the applicant's concern for accuracy, detail, thoroughness, and excellence.

Certificates/Licenses

At the secondary level, and at the postsecondary level in some states, the prospective teacher must hold a teaching certificate or be certifiable in the state, at the level and in the subject to be taught. In cases in which the candidate comes straight from industry, this may be a temporary or one-year vocational certificate, good for a specified number of years during which the teacher must earn a regular certificate. Early in the selection process, you can request simply that the candidate state that he or she is or can be

certified. Before hiring the candidate, however, you must have proof of certification.

The certificate can tell you a great deal. It means that this candidate meets the criteria set by the state for its teachers. This can include completing specified courses, maintaining an acceptable grade point average, and passing certain teacher examinations. It tells you that the candidate meets at least minimum standards, as defined by your state.

Licensing comes into play primarily in the health-related occupations and cosmetology. Teachers of these subjects, psychologists, and school nurses, for example, must be licensed. The license, like the teacher certificate, indicates that the holder meets the minimum standards required, as measured by course work, clinical experience, and licensing examination.

Recommendations

Generally, one part of the application form asks the applicant to list the names, addresses, and phone numbers of persons who could provide recommendations for him/her--attest to his/her employability. The magic number of names to be listed seems to be three, or at least three. The directions for this section of the form need to specify how many names should be listed and what types of persons they should be. Relatives are usually not to be listed. Former employers, high school teachers, college professors are commonly asked for.

For recent college graduates, the process of acquiring inputs from those listed is often quite simple. The prospective teacher can ask each of the references to prepare a letter of recommendation, and then he/she can have each of those letters filed in the college or university placement office. Copies of these letters can then be sent to each place at which the prospective teacher applies. This is a more efficient system, requiring the least repetition of effort.

In other cases, you or someone on your staff will need to contact each of the references listed by phone or letter to secure their input. Before so doing, you need to check the laws governing this area. In some places, it is illegal to contact former employers by phone without the express consent of the applicant. This is designed to protect the applicant from an unfair negative recommendation, provided by an employer with whom he/she had a personality conflict, for example.

Information available from references has limitations. The former employer you cannot contact because the applicant will not give his/her consent may be the one person who can tell you that this prospective instructor was consistently absent, antagonistic, and careless--information you need to know. Too, applicants tend, naturally, to list only persons they know will provide a positive recommendation. Furthermore, many people are reluctant to say anything bad about a former (or soon to be former) employee, for good and bad reasons. The boss who wants to be rid of a poor employee--secure in

his/her tenured position--does not want to hinder his/her chances of getting a job elsewhere. Some references fear legal action if they provide a negative recommendation. Laws designed now to protect employees from unfair treatment unfortunately also sometimes make it difficult and extremely time consuming to dismiss a poor employee. A great deal of documentation is required. The employer who has not maintained such a record of documentation is liable should he or she provide a poor recommendation unsubstantiated by records.

Mostly, however, it's just a matter of good-heartedness. It's not easy to sit in judgment of another, so one tends to give the benefit of the doubt. One searches for good things to say and either ignores or downplays the bad. This is not to say that recommendations are valueless--only that they should be used as only one source of information, balanced with information secured from other sources.

One way of acquiring the most objective references possible is to design a form for the references to complete, requiring standardized responses. The reference can, of course, supplement the form with a letter providing additional information should they desire. Sample 10 shows a form that could be used for this purpose.

Performance records. If the candidate has been enrolled in a training program that requires the passing of performance tests (e.g., a performance/competency-based program), you may have access to the records of the candidate's performance on these tests. For example, you are presently reading an information sheet in a competency-based administrator education module. To demonstrate competency in the skill covered by this module--selecting school personnel--you should perform the skill in an actual situation. Your performance would be assessed by your resource person using the "Administrator Performance Assessment Form" at the end of the module. Pre- and inservice teachers in programs using the National Center's PBTE modules have their performance evaluated using similar checklists. If the completed assessment forms (or a summary of the data on these forms) are available to you for a given candidate, you can tell exactly what skills the candidate possesses--at what level.

Another form of performance record, which is becoming slightly more common, is the videotaped performance record. You may require or the candidate may voluntarily provide a videotape showing his/her performance in presenting a lesson or executing some other relevant skill. If this type of record is available to you, it can be extremely valuable. It allows you to actually see the candidate "in action," thus giving you a firmer basis--a more objective basis--upon which to make selection decisions.

Tests

You can require that prospective candidates take tests to prove their qualifications. These can be standardized national or state tests, which the candidates take on their own; test scores can then be submitted to you. Or you can devise your own local tests.

SAMPLE 10

RECOMMENDATION FORM

BOARD OF EDUCATION
MERIDEN, CONNECTICUT

_____ has applied for a teaching position in our school system and has given your name as a reference.

Please be kind enough to fill in the form below and return it to this office as soon as possible.

All frank and honest information that you may see fit to include on this form will be treated as confidential.

	Excellent	Good	Fair	Poor	Do Not Know
Personality and poise					
Moral character					
Sense of responsibility					
Critical judgment					
Breadth of general knowledge					
Potential as a teacher					
Community service					
Imagination and probable creativity					
Understanding of others					
Ability to express ideas					
Professional awareness and ethics					

If you are a former employer, please rate the following items:

Ability to work without supervision					
Attendance					
Attitude toward authority					
Attitude toward subordinates					
Motivation and drive					
Learning speed					
Physical energy					

Candidate's greatest asset? _____

Chief weakness? _____

General Comments (Please use reverse side if necessary)

Signed _____

Thank you for your thought and consideration.

Local tests. On the simplest level, you may (as part of the interview, for example) ask the candidates to respond to some simple test items that attempt to get at their attitudes toward education and their role in it. Candidates can be asked to list their likes (and dislikes) about education or some aspect of it. They can be given a list of elements (e.g., a list of typical job responsibilities) and be asked to rank them from favorite to least favorite.

Some institutions and districts have formalized this testing process through the establishment of an assessment center where candidates take a battery of tests related to job skills, knowledge, and attitudes. Simulation experiences (e.g., in-basket exercises) in which the candidate is asked to respond to a hypothetical situation or solve a problem are common. Writing ability can also be assessed, as can job-related knowledge.

The crucial consideration whenever you administer such tests is to ensure that the tests are fair, reliable, and valid, and that they measure only job-related elements. If your tests require non-job-related information or can be perceived to discriminate unfairly on the basis of race, sex, and so on, you can expect complaints, which may lead to legal action.

State tests. Some states are developing their own teacher examinations, primarily for certification purposes. Two such states are Florida and Georgia. In Florida, a Florida Teachers Examination has been developed based on 23 generic teacher competencies identified by educators in Florida. The one-day exam is exclusively paper and pencil, covering basic skills (reading and writing) and professional skills. Technical skills are not covered, but Florida uses the National Occupational Competency Testing Institute (NOCTI) to assess skill in this area. Teachers wishing to be certified in Florida must take the Florida Teachers Examination; it is mandated by legislature.

In Georgia, a set of Teacher Performance Assessment Instruments (TPAI) has been developed to provide performance criteria for certifying beginning teachers. The three certification instruments cover (1) teaching plans and materials, (2) classroom procedures, and (3) interpersonal skills. Skill in these areas is measured through review of teacher-prepared portfolios of plans for a unit, through interviews, and through observations by trained observers/evaluators.

National Teacher Examinations (NTE). Developed and administered by the Educational Testing Service (ETS), the NTE are, according to the ETS 80-81 Bulletin of Information, "standardized, secure tests that provide objective measures of academic achievement for college seniors completing teacher education programs and for advanced candidates who have received additional training in specific fields." The tests are administered three times a year (November, February, and April) at ETS-supervised centers throughout the United States. Each test requires one day to administer and covers three major domains: general education, professional education, and subject-field specialization. The three-hour morning session covers "Common Examinations and Teaching Area Examinations," which include (1) professional education; (2) written English expression; (3) science and mathematics; and (4) social

studies, literature, and the fine arts. The two-hour afternoon session covers one specialized teaching area. Tests are available in 26 areas, including administration and supervision, business education, home economics education, and industrial arts education.

The tests are machine scored, and after scoring, ETS forwards a confidential report of the scores to each candidate and to the school systems or colleges designated by him/her. According to ETS, the test results are "used by local school districts as one factor in the initial selection of staff members, in the assignment of staff members to teaching situations, and in helping to identify staff members for school leadership roles. The examinations are being utilized by states as an element in teacher certification and as a source of objective data for conducting research on the quality of teacher education within a state. Colleges use NTE results in evaluating their teacher education programs and in counseling students seeking teaching positions."

The examinations have been thoroughly tested and found to be valid. In addition, in a suit, "N.E.A. v. South Carolina," the United States Supreme Court affirmed the decision of a three-judge Federal District Court, which had upheld the use of the NTE in the state's certification and compensation system. In its April 1977 ruling, the federal three-judge panel stated, "There is ample evidence in the record of the content validity of the NTE . . . The NTE have been demonstrated to provide a useful measure of the extent to which prospective teachers have mastered the content of their teacher training programs."

Bear in mind, however, that this is a measure of what teachers know, not what they can do. A person can obtain a perfect score and yet--because of a lack of enthusiasm, a monotone voice, and a marked dislike for slower learners or other such characteristics--be a terrible teacher. As with all other information-gathering devices, this type of test is only useful if it is used in concert with other devices.

ETS is generous with its promotional and descriptive materials. By writing to ETS, you can obtain a newsletter, an annual bulletin of information, a technical handbook, guidelines for use, brochures for each examination (including sample test items), a list of institutions that use the scores, and many other helpful materials. Their address is National Teacher Examinations; Educational Testing Service; Box 911-P; Princeton, NJ 08541.

National Occupational Competency Testing Institute (NOCTI). NOCTI is a not-for-profit consortium of states, formed in 1973, which has supported the development of 49 competency tests relating to 40 different occupations, administered through 28 area test centers in 26 states. The tests, developed by skilled tradespersons and test development specialists nationwide, are generally used to select students into industrial teacher education programs and to certify industrial teachers. A Teacher Occupational Competency Testing (TOCT) instrument is also available.

The tests cover such areas as air conditioning and refrigeration, auto body repair, baking, carpentry, cosmetology, electronics technology, machine trades, masonry, plumbing, power sewing, quantity food preparation, sheet metal, and welding. Each test usually requires one day to administer and consists of two parts: (1) a two- to four-hour written test of knowledge, and (2) a two- to six-hour performance test of skills. The written portion covers such areas as tools and equipment, properties of materials, calculations used, application of scientific principles to problem solving, safety procedures, and government regulations. The performance test portion requires trouble shooting, making adjustments and repairs, operating equipment and machinery, using measuring instruments, and observing safe operating procedures. Additional information is available by contacting NOCTI at the following address: National Occupational Competency Testing Institute; 45 Colvin Avenue; Albany, NY 12206.

Interviews

Interviewing candidates is probably the pivotal information-gathering activity. Information acquired through application forms, letters, and records can certainly tell you a great deal about the candidate's background and qualifications. From references, you can even get a view of the candidate through others' eyes. This information allows you to do some initial screening of candidates--eliminating those who do not meet the criteria specified. But it is during the interview process that one can meet the candidate as a whole person and a personality and more certainly determine if he or she is the right choice. This is both good and bad.

On the good side, the interview gives the interviewer a chance to accomplish the following:

- Explore answers given on application, etc., that require more explanation or clarification
- Ask questions that go beyond the information provided prior to the interview, such as the candidate's philosophy of education, attitudes toward discipline and students use of chemicals, feelings about his/her role in the educational process, and so on
- Observe the candidate's "personality" as evidenced by such characteristics as enthusiasm, poise, appearance, and so on
- Assess the candidate's communication skills (verbal and nonverbal)

The interview, which should ideally be a dialogue, also gives the candidate an opportunity to ask questions about the position and the institution or district.

On the bad side, the candidate the interviewer "likes" best may not be--objectively--the best candidate. A candidate with a strong, pleasing personality--and with attitudes similar to those of the interviewer--can win over an interviewer despite the fact that he or she is not the strongest candidate.

It is for this reason that the interview process must be carefully planned to maximize its objectivity and that interviewers must be skilled, with training provided if needed.

SRI Perceiver Academies. Selection Research Inc. (SRI) is a private research organization, staffed largely by practicing psychologists and support personnel, which has "systematically developed an interview selection technique that objectively identifies (predicts) those persons who are likely to be successful teachers." SRI offers training through Teacher Perceiver Academies to train administrators and others to use this interview technique.

During 25 years of research, SRI staff identified and validated those characteristics that are descriptive of successful teachers and that discriminate the successful from the unsuccessful teachers. From this data base, a structured, low stress interview process was developed, which identifies 12 themes (i.e., the qualities of the outstanding teacher) in three broad categories: (1) the teacher's conceptualization of teaching, (2) the teacher's relationship skills (e.g., rapport building, listening skills), and (3) the teacher's ability to provide stimulating, directive activity.

SRI offers introductory seminars, continuation for competency seminars, and growth facilitator seminars. The introductory seminar is just that--"an opportunity to study the process and decide if it is right for you." In continuation seminars, the trainee studies and codes a minimum of eight interviews; a minimum of 32 is required for certification (generally 100 hours of training per person). Growth facilitator seminars prepare trainees to use the perceiver interview as a tool for staff development.

Also available through SRI are an Administrator Perceiver Academy, a Student Perceiver Academy, and a Support Services Perceiver Academy. Further information is available from SRI at the following address: SRI Perceiver Academies; Selection Research, Inc.; 2546 South 48th Street; P.O. Box 6438; Southeast Plaza; Lincoln, NE 68506.

Individual vs. group interviews. The interview process can be time consuming. Thus, there is a tendency to leave it in the hands of one or two persons (e.g., personnel director and principal or dean). This can lessen the objectivity however. There is an increasing trend toward involving more people in the process to ensure objectivity. One approach is to have several staff members at different levels (personnel director, supervisor, colleagues) a student representative, a board member, and advisory council member, for example, interview the candidate separately. This can be less threatening to the candidate than facing a group of interviewers, but it may not be a very efficient use of time--both the candidate's and the staff's. Another option would be to have one person conduct an interview, followed by an informal gathering in which others can get to meet and talk with the candidate--and vice versa.

A group interview, involving the candidate and several institutional representatives, can be most efficient and objective, given that several conditions are met, as follows:

- The interviewers are prepared, fully aware of, and in agreement with the selection criteria and the relative weight of each criterion. Five interviewers with five very different views of what the candidate should be like will give you chaos and discussion, not objectivity.
- The ease of the candidate must be of prime concern. The interview must be a discussion among all parties, not a cross-examination. Facing several "judges" at once can be intimidating to the candidate. Every effort must be made to promote, instead, a comfortable exchange of questions and ideas.

A combination of individual and group interviews is also possible. The initial candidates could, for example, be interviewed by one person (personnel director or other administrator), who would screen these candidates to select the best. The best candidates could then be interviewed using a group or committee approach.

Bear in mind that there are excellent reasons for involving staff and students in the interview process. These people will be in direct contact with whomever is ultimately chosen so their views are important.

Directive vs. nondirective interviews.[1] Directive interviews involve the use of preselected questions aimed at drawing out information about the candidate's skills, education, and experience. The advantages of this approach are as follows:

- Interviewers who are less well trained can be used because the questions to be asked have all been laid out.
- Questions can be constructed to meet U.S. Equal Employment Opportunity Commission (EEOC) standards; they can elicit standard responses that can be compared.
- Questions get directly at factual information to determine the candidate's basic qualifications.

There are a number of disadvantages to this approach, however, as follows:

- Other relevant information may be ignored because it is not covered by the preselected questions.
- The "canned" nature of the questions can cause the interview to lack "flow" and "naturalness," which may make the candidate anxious or reticent.

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1. Adapted from Warren D. Robb, "Interviewing Efficiency: Speed and Effectiveness in Employee Selection," S.A.M. Advanced Management Journal (Spring 1980): 24-30. © 1980 by S.A.M., a division of American Management Associations. All rights reserved. Reprinted by permission of the publisher.

- Since the interviewer is trained simply to ask questions and record answers without showing emotion or using any revealing body language, the interview can be impersonal or even inhumane.

Nondirective interviews, on the other hand, use open-ended questions aimed at eliciting the candidates opinions, ideas, and values. For this approach to work, a person trained in the use of effective interview techniques is essential. The advantages of the nondirective interview are as follows:

- It permits the evaluation of the whole person.
- Open-ended questions allow the candidate to give detailed information.
- The interviewer can follow up on responses to ask for further information or a related question.
- The tone of the interview is comfortable and conversational.
- The candidate has an opportunity to demonstrate his/her judgment and skills in solving problems, making decisions, acting in a leadership capacity.

The disadvantages of this approach are as follows:

- The interviewer can be subjective; bias and selective perception can creep in.
- The time required (or used) for each interview may be excessive.

Clearly, some combination of approaches would be ideal, one which includes the advantages of both interview styles. Some structure is needed to ensure objectivity, equity, and acquisition of all necessary information. But the atmosphere must be comfortable and humane, and the candidate must have the opportunity to show his/her true worth and to ask questions.

Questions to ask. Sample 11 shows a series of questions that an interviewer could use to structure an interview. In developing the list of questions to be used as a guide in your institution, certain rules should be observed; do not ask the following types of questions:[2]

- Questions that can be answered with a simple yes or no
- Unimaginative questions that suggest proper answers
- Questions that are not neutral--that reveal the interviewer's attitude
- Irrelevant questions or questions not covering BFOQs
- Questions that have already been answered (e.g., on the application form)

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2. Adapted from Gerald F. Clifford, "Criteria and Techniques in the Recruitment and Selection of Teachers," May 1975. ED 115 601

SAMPLE 11

INTERVIEW QUESTIONS

While lengthy, this list of questions is not complete. The questions here should start you thinking about concerns that are important to you, and the particular job you are trying to fill. You will notice they all address one item at a time. They use "What," How," and "Why" to make sure the applicant will give you a full response. They avoid the use of absolutes like "always" and "never." They do not give away the correct answer. Save certain difficult questions for late in the interview, particularly those concerning job performance.

A. Warm-up Questions

1. What made you apply for this position?
2. How did you hear about this job opening?
3. In a brief moment or two, would you summarize your work history and education?

B. Work History

1. What special aspects of your work experience have prepared you for this job?
2. Can you describe one or two of the most important accomplishments in your career?
3. What kinds of supervision have you received on previous jobs?
4. What kinds of supervision have you used with your subordinates?
5. What kinds of supervision do you feel are best for the job you are seeking?
6. Can you describe one or two of your greatest disappointments in your career?
7. Why did you choose to pursue this career field?
8. Why are you leaving your present job? (Or, why did you leave your last job?)
9. What kinds of co-workers do you work with best? Why?
10. Which job, of all the ones you have had, do you like best? Why?
11. What kind of organizational structure do you prefer to work within?
12. Where would this job fit into your overall career plan?
13. Can you tell me something new that you developed on a previous job (a product or procedure that you are particularly proud of)?

C. Education and Training

1. What special aspects of your education or training do you feel have prepared you for this job?
2. How has your education or training helped you perform better in previous jobs?
3. What courses in school have been most influential in helping you do your job?
4. What areas would you most like to receive additional training in if you are selected for this job?

D. Career Goals

1. a. What kind of job do you see yourself holding five years from now?
   b. What do you perceive is the best career path for you?
   c. How will this job help you achieve your career goals?
2. What would you most like to accomplish if you are selected for this job?
3. What could make you leave this job?

E. Job Performance

1. Everyone has strengths and weaknesses as workers. Can you tell me what your special strong points are?
2. When you have been told about, or discovered for yourself, a problem in your work performance what have you typically done? Can you give me an example?

F. Salary and Benefits

1. What kinds of benefits do you think are important in a job?
2. What would you consider to be a good rate of salary growth in this job? Why?
3. How did your salary on your previous job stack up against what you feel you are worth?

Interview arrangements. Whether you are conducting an interview yourself or training others to conduct them, consideration must be given to the need to make careful arrangements for each interview. Arrangements must be made with and for the candidate. First, an interview date and time, which are convenient for both the candidate and interviewer, need to be established. The date and time should be verified with the candidate by phone or letter.

The candidate also needs to know if any special arrangements have been made, for example, meeting with the faculty later in the faculty cafeteria. At the postsecondary level, a candidate (depending on rank and salary involved and budget available) may be reimbursed for travel expenses. Candidates need to be informed concerning such matters. In your correspondence, you need to make it very clear whether the candidate is traveling to the interview at his/her own expense or what other arrangements have been made. At one postsecondary institution, for example, final candidates were reimbursed for travel to the interview unless a job offer was made and not accepted. This tactic is designed to prevent someone from getting a free trip to, say Aspen, without any intention of accepting the job.

Second, arrangements for the candidate involve securing a room where the interview can be held--one where the atmosphere is comfortable and you or another interviewer will be free from interruptions. Finally, all staff who are involved need to be notified, and their exact responsibilities made clear to them. If there is to be a group interview, for example, the interviewers need to know when and where this is to occur and what is expected of them. Will there be a group leader? Where should the candidate be taken following the interview? Can a definite commitment to hire be made at this time? And so on. Without thinking through such questions in advance and providing clear structure to those involved, you can find yourself with confusion. This is not fair to staff nor does it convey to the candidate a favorable picture of the institution. With proper planning, however, the interview can be a key device in the staff selection process.

Nonprofessional/Noninstructional Staff

The selection process for staff at the nonprofessional/noninstructional level (e.g., clerical, custodial, cafeteria) does not differ a great deal from the process used for professional/instructional staff. The same principles hold; the number and type of devices may vary, however. First, there will probably be fewer unsolicited applications. Most will be received in response to a specific classified ad or posted notice. The candidate writes, calls, or comes in to complete an application form. Thus, there may not be a formal letter of application, and candidates at this level are less likely to provide a resume. Nor will there generally be any certificates or licenses required. The following are the devices that are generally used to gather information about prospective nonprofessional/noninstructional staff:

- Application form--The form should be tailored to solicit information pertinent to the job in question. Concerning the prospective secretary, for example (1) did he/she take secretarial courses in high

school or at a postsecondary institution, (2) does he/she have secretarial work experience, and (3) can he/she type and/or use shorthand, and at what speed? Thus, the form will be different from that used for professional/instructional staff. More emphasis may be placed, for example, on job experience. Autobiographies are less frequently asked for. The developmental guidelines to be followed, however, should be the same as those given on p. 58. And, in reviewing completed applications, you should be asking the same types of questions as those given on pp. 58-59. If you are hiring a custodian or cafeteria worker, handwriting and spelling may not be crucial, but all these skills are important if you are hiring a secretary.

- Recommendations--Generally, applicants will be asked to list the names, addresses, and phone number of references on the application form. Former employers and teachers are commonly asked for. However, in some cases, for noninstuctional jobs, friends--persons who have known the applicant for an extended period of time and can serve as character references--are acceptable. Other than that, the same guidelines and autious as those described on pp. 60-61 apply here.
- Performance records--Such records, per se, will probably not be available. However, information concerning on-the-job performance should be available through contact with the candidate's references.
- Tests--It is rare for performance tests or tests of knowledge to be administered at this level (rightly or wrongly), with the exception of clerical positions. For clerical positions, it is not unusual to administer written tests covering grammar and spelling, and performance tests for typing or shorthand speed and accuracy.
- Interviews--Interviews are equally important at this level. These will generally be individual interviews, involving an immediate supervisor. But all key guidelines apply at this level: preparation, structure, fairness, and humaneness are as important here as in interviewing professional/instructional staff.
- Other devices--Depending on the position to be filled, some additional devices are used at this level: fingerprinting, credit checks, bonding, photostatic copies of military records, and so on. Persons hired for positions requiring the handling of money, for example, may need to be bondable to be hired.

Two Additional Concerns

No matter what level of staff you are seeking, one concern that must be uppermost in your mind is that the devices used and the screening decisions made must reflect and be consistent with the information provided in advertising the position. In other words, you are opening yourself up to a possible lawsuit if you reject a candidate for the position of electronics instructor because he/she lacks previous experience or a degree or whatever, if those qualifications were not listed as "required" or "preferred" on the position vacancy notice.

Second, equity must always be a concern, and therein lies a potential dilemma. On the one hand, you cannot ask "irrelevant" questions such as race and sex. On the other hand, you need to have evidence that you are actively recruiting and considering women and blacks and hispanics and so on. To cope with this seeming dilemma, many institutions have developed a form, separate from the application forms, that the applicant can voluntarily complete and remit. The form, which is handled confidentially, asks the applicant questions regarding sex, race/ethnicity, handicapping conditions, Vietnam-era veteran status, date of birth, and usually, how the applicant heard about the position (see sample 12).

By selecting and devising the right selection tools, you can ensure that you have the right information--the information needed to make wise hiring decisions and to document that your hiring practices are fair and equitable.

You may wish to locate and review sample devices (application forms, tests) for gathering information about candidates. These can be located by checking with your resource person or local educational institutions. As you review each sample, ask yourself the following kinds of questions:

- Are the items in compliance with EEOC guidelines?
- What kind of information would the device provide? How useful would it be? How thorough a picture would it give of the applicant's qualifications?
- How clear are the items and directions?

You may wish to arrange through your resource person to visit and interview an experienced administrator at the secondary or postsecondary level to determine what devices he/she uses to gather information about candidates and how that information is screened. Before the interview takes place, you should prepare a list of questions, such as the following, that you wish to have answered:

- What devices are typically used? Are different devices used for positions at different levels?
- How useful is each device? What problems are typically encountered, and how are these resolved?
- Who is involved in the process? Does this seem to be an efficient use of staff time?
- In screening, how is the information interpreted and weighted?

SAMPLE 12

EQUAL EMPLOYMENT OPPORTUNITY INFORMATION REQUEST

INDIANA UNIVERSITY-PURDUE UNIVERSITY AT FORT WAYNE

A memorandum originating in the Office of the Secretary, U.S. Department of Health, Education, and Welfare, states that Affirmative Action employers "are required to collect and maintain data on the race, sex, and ethnic identity of all applicants for employment." We must, therefore, ask you to complete the following questionnaire. Please note that you should sign the questionnaire and return it separately to the Affirmative Action Officer/Personnel Office. DO NOT RETURN IT TO THE RECRUITING DEPARTMENT. This questionnaire is for reporting purposes only and will not be used in the hiring decision. Thank you for your help.

NAME: _____ DATE: _____

POSITION APPLIED FOR: _____
Rank/Title

LOCATION OF POSITION: _____
Campus/School/Department

Information on this position was made available to me from the following source:

_____

CITIZENSHIP: ____ U.S. OTHER: _____
Country

ETHNIC DATA:

These categories should not be interpreted as scientific or anthropological in nature. They were developed by the Federal government in response to needs expressed by both the Executive Branch and the Congress to provide for the collection and use of compatible, nonduplicated, exchangeable racial and ethnic data by Federal agencies.

____ American Indian or Alaskan Native [A person having origins in any of the original peoples of North America, and who maintains cultural identification through tribal affiliation or community recognition.]

____ Asian or Pacific Islander [A person having origins in any of the original peoples of the Far East, Southeast Asia, the Indian subcontinent, or the Pacific Islands. This includes, for example, China, Japan, Korea, India, Pakistan, Bangladesh, Sri Lanka (formerly Ceylon), Nepal, Sikkim, Bhutan, Afghanistan, the Phillippine Islands, and Samoa.]

____ Black (not of Hispanic origin) [A person having origins in any of the black racial groups.]

____ White (not of Hispanic origin) [A person having origins in any of the original peoples of Europe, North Africa, or the Middle East.]

____ Hispanic [A person of Mexican, Puerto Rican, Cuban, Central or South American, or other Spanish culture or origin, regardless of race.]

BIRTHDATE: _____ BIRTHPLACE: _____ SEX: ____ Female ____ Male
Month, Day, Year City, State (or Country)

PHYSICAL HANDICAP: _____
Specify if you have any physical handicap or condition that will require special consideration in your employment.

MILITARY SERVICE: Disabled veterans and veterans of the Vietnam era are entitled to receive special consideration under the Affirmative Action Plan. If you are entitled to this consideration, please tell us and attach a statement as prescribed on the back of this form.

____ I am entitled and have attached a statement.

_____ _____
Signature of Applicant Date

NOTE: This information will be used only for the purpose of monitoring the success of our Affirmative Action Plan and will not be used to discriminate against any applicant. Please return this form in the separate envelope provided. DO NOT RETURN WITH COMPLETED APPLICATION FORM

Indiana University-Purdue University at Fort Wayne is an equal opportunity employer and activitely seeks applications from all qualified persons, whatever their sex, race, religion, national origin, age, or handicap.

The following "Case Study" describes how a vocational/technical administrator gathered and screened information concerning a candidate for a clerical position. Read the situation and critique in writing the performance of the administrator described: what did she do correctly, what did she do incorrectly, and what should she have done instead?

CASE STUDY

Ms. Maureen Maloney, an administrator at Saxonville Tech, was sorry to learn that the head school secretary, Mrs. Angela Paolini, had decided to take early retirement. Hers was a crucial position; everyone in the school relied on her expertise and knowledge of the system. In order to try to adequately refill this key position, Ms. Maloney first met with Mrs. Paolini. Together they went over the job description on file to make sure that it adequately reflected the job. As a result of this meeting, Ms. Maloney developed the following vancancy notice:

SECRETARY

Saxonville Tech seeks applications for a permanent full-time head school secretary position. Types correspondence and reports; answers phone; serves as receptionist; maintains records and accounts; maintains files; schedules appointments and meetings; duplicates; orders supplies; supervises office staff. Experience preferred. Equal opportunity employer.

Ms. Maloney arranged for notices to be posted in local educational institutions. In addition, a classified ad was placed in several newspapers and the state employment service was notified.

Applicants were asked to complete an application form (see pp. 77-78) and to take a typing test for speed and accuracy.

The response was good. Applications were completed by 12 persons. Four of these persons met the minimum qualifications and had had previous experience. Ms. Maloney arranged to interview these persons. Each interview lasted approximately fifteen minutes, and she used this time to explain the job in more detail, to explore answers given on the application that required more explanation or clarification, and to identify if the candidate had the necessary poise and interpersonal skills to handle the job. All four candidates were impressive during the interview.

Ms. Maloney then contacted each candidate's most recent employer to discuss his/her job performance. All four candidates were given enthusiastic recommendations by their former employers.

Ms. Maloney was in a quandry: whom should she select? All were qualified, all were highly recommended, and all seemed to have the potential to fit into the system. She rechecked their application forms. All were neatly completed; all spelling was correct. She rechecked their typing test results. All candidates had typed in the range of 60-70 words per minute. All things being so equal made it difficult. Ms. Maloney finally made her decision. One of the candidates had shorthand skills; that would be an advantage in taking notes at meetings. Thus, the decision was made, and the candidates notified accordingly.

One of the "rejected" candidates couldn't understand why she hadn't been chosen, so she called the school. Ms. Maloney explained about the shorthand skills, and that was the end of that.

SAXONVILLE TECH
EMPLOYMENT APPLICATION

Name _____

Address _____

Social Security Number _____ Sex _____

Citizen of U.S.A. _____ Race _____

Marital Status _____ Date of Birth _____

Notify in Case of Emergency

Name _____

Address _____

By Whom Were You Referred

Do you have any physical handicaps or limitations that might interfere with or be aggravated by your work? _____
Have you had any serious illnesses, operations, or nervous disorders? _____
Have you ever been dismissed from a position for delinquency, misconduct, or disgraceful conduct? _____
Are you now or have you ever been addicted to the use of habit-forming drugs or intoxicating liquor? _____
Have you ever been arrested, charged, or convicted of a felony or misdemeanor (except minor traffic violations)? ___

What are your hobbies? _____
What business or civic groups do you belong to? _____

Can you type? Yes ___ No ___ Manual ___ Electric ___ Word Processor ___
WPM ___

Can you take dictation? Yes ___ No ___ Method ___ WPM ___

What office machines can you operate? _____

Work Experience

Name and Address of Employer	Dates of Employment	Position Held

Education

Name and Address of School	Dates Attended	Degrees Earned

Personal References (do not list former employers or relatives)

Name	Address	Years Known	Telephone

Signature _____ Date _____

Compare your completed written critique of the "Case Study" with the "Model Critique" given below. Your response need not exactly duplicate the model response; however, you should have covered the same major points.

MODEL CRITIQUE

Ms. Maloney's performance had many strengths. Her foundation for the selection process, for example, was sound. She started with a job description and sought the assistance of the incumbent in ensuring the description was accurate. Furthermore, she adequately publicized the position.

Her choice of selection devices was appropriate. For a clerical position, an application form, typing test, and interview would be most useful. And she used her time wisely by using the completed applications and typing test results to do an initial screening before conducting interviews.

She seems to have done a good job in "reading" the applications, both for qualifications and for neatness, spelling and so on. Her interview technique likewise seems effective from the little we are told. She used the time to provide information, to supplement the information she already had, and to learn about each candidate's poise and interpersonal skills--information most readily available through the interview.

With four such equally qualified candidates, one would tend to look for some rational basis for making a decision. Selecting the one candidate with "something extra" that could be useful on the job was probably a very good decision.

Where Ms. Maloney went awry was in announcing to the possibly disgruntled candidate that shorthand skills were the deciding factor. According to the vacancy notice, shorthand skills were not required. Ms. Maloney should simply have indicated that, although the final candidates were all well qualified and the decision was a tough one, a decision had to be made.

Should this disgruntled candidate wish to contest the decision, Ms. Maloney could be providing her with a seeming basis to do so. Given two other problems in the selection process--the application form and the calls to former employers--this candidate could choose to contact the EEOC and cause real trouble for Ms. Maloney and her institution.

The application form has real problems. First, it is poorly formatted. The material is crowded and adequate space for responses is not always provided. Furthermore, there are practically no directions to guide the applicants--to let them know what they are supposed to put in the blanks. For example, is one supposed to fill in yes or no following the questions on handicaps and so on? Or is an explanation required--or allowed? Can the

candidate, for instance, explain that, although a former alcoholic, he/she has been a nondrinker for the last 15 years? Regarding work experience, how much information is required and in what order? All jobs held? Jobs during the last 10 years? Jobs related only to the position sought? Most recent first? For each section, clear, simple directions should have been provided.

The most critical flaw in the application form, however, is the inclusion of a number of items that in no way relate to bona fide occupational qualifications: sex, race, marital status, and so on. The inclusion of such items is patently illegal.

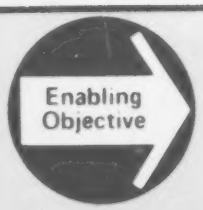
In addition, Ms. Maloney could be taken to task for contacting the former employers by phone without the express consent of the applicant. The employers, you will note, were not to be included as references. The applicant, thus, has not authorized contact with the former employer. Authorization is needed.

Let us hope that the disgruntled candidate does not decide to pursue the matter and that Ms. Maloney recognizes and rectifies these flaws so that future efforts will be improved.

Level of Performance: Your completed written critique should have covered the same major points as the "Model Critique." If you missed some points or have questions about any additional points you made, review the material in the information sheet, "Gathering and Screening Information Concerning Candidates," pp. 53-74, or check with your resource person if necessary.

Learning Experience V

OVERVIEW

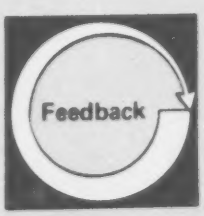


After completing the required reading, critique the performance of an administrator in a given case study in managing the staff selection process.

You will be reading the information sheet, "Managing the Staff Selection Process," pp. 83-90.

You may wish to interview an experienced administrator to determine how he/she manages the staff selection process.

You will be reading the "Case Study," pp. 91-92, and critiquing the performance of the administrator described.



You will be evaluating your competency in critiquing the administrator's performance in managing the staff selection process by comparing your completed critique with the "Model Critique," pp. 93-94.

NOTES

As part of the selection process, it is important to build in devices to ensure that the process runs smoothly. Applicants need to be kept informed concerning the status of their applications. Records need to be kept to document the materials received, actions taken, and decisions made. For information concerning the management of the selection process, read the following information sheet.

MANAGING THE SELECTION PROCESS

Managing the selection process involves, in general, three activities: (1) keeping each applicant informed of his/her status and progress through the process, (2) keeping records of the information received and applicant status, and (3) evaluating your selection process so it can be refined and improved where necessary.

Notifying Applicants of Their Status

The selection process generally follows a pattern similar to the following:

1. An unsolicited letter of application is received and acknowledged, using a form letter similar to that shown in sample 13, constructed to meet the employment situation.

   OR

   A letter of application is received in response to a posted or advertised vacancy and is acknowledged by letter, with an enclosed application form and descriptive material.

2. The application materials as requested (application form, resume, transcripts, recommendations) are received from the candidate and acknowledged. This acknowledgement letter should either (a) remind the candidate that the application is being placed in an active file for consideration should an opening occur, (b) that the proposed interview date noted in his/her application is okay, or (c) that an interview date needs to be arranged at his/her convenience. In some cases, the application materials will provide sufficient information to determine that the applicant does not meet the criteria. In that case, a letter of nonacceptance (see sample 14) should be sent.

3. An interview (of all candidates or all top candidates) is conducted.

4. All information from all sources on all candidates is reviewed against selection criteria, and (a) the best candidate is selected, or (b) the top candidates are selected and invited in to a second interview, and then the final choice is made.

SAMPLE 13

RESPONSE TO UNSOLICITED LETTER OF APPLICATION

Dear _____:

Thank you for your recent letter inquiring about the possibility of a teaching position in the Anycity School District starting in the fall of 19--.

[If there is a position available--] I am enclosing a teacher application, together with a brochure describing the school system and community. We are at the present time considering candidates for a home economics teaching assignment at the senior high school level. Therefore, I should be pleased to receive your application. I should hope that you would plan to visit in the area during the course of the spring, at which time an interview might be arranged.

[If there may be a position available--] I am enclosing a teacher application, together with a brochure describing the school system and community. Our exact staffing needs in home economics at the senior high school level are not definitely determined at this time. However, if you fill out the enclosed application and return it to this office, we will be pleased to place it in our active file. Should an opening become available in your area, we will contact you.

[If there is no position available--] I am enclosing a teacher application, together with a brochure describing the school system and community. We do not anticipate an opening in your area at this time. However, if you fill out the enclosed application and return it to this office, we will be pleased to place it in our active file. Should an opening become available in your area, we will contact you.

We appreciate your interest in Anycity. If we may be of any further assistance, please do not hesitate to contact this office.

Sincerely,

Assistant Superintendent

SAMPLE 14

LETTER OF NONACCEPTANCE I

Dear _____:

Thank you for your interest in applying to teach in the Anycity Schools.

I have completed the initial screening of candidates for the position for which you have applied, and have selected four applicants who will be interviewed for the position. It is with regret that I inform you that your application is no longer being considered, but I will be happy to keep your application on file for possible future reference.

We appreciate your interest in our district and thank you for your inquiry.

Sincerely,

Superintendent

5. The selected candidate is offered the position (see sample 15). If he/she accepts, the remaining candidates must be sent letters of nonacceptance (see sample 16). If he/she does not accept, a second-choice candidate can be contacted or the search process can be reopened.

What is of primary importance here is that, whether you are searching for a janitor or a department head, the process needs to be thorough, fair, and humane. Applicants need to be given a reasonable opportunity to present their qualifications, and they need to be kept informed of what is happening in the process.

To manage this task of keeping applicants informed, form letters are probably a must. But a word of caution is in order. Just as you are judging applicants by the quality of their application materials, so they are judging you by the materials you send. In reviewing actual samples of form letters received by applicants from various institutions, the writer found an almost incredible variation in quality. At the bottom of the heap in quality were dittoed letters (blue print) with the name typed in (black print), with words crossed out and corrected by hand.

Some letters were inappropriate to the situation. An applicant got one letter saying there were no openings, but suggesting that he/she apply anyway so the application could be placed in an active file for consideration should a vacancy occur. The applicant did so and received a form letter stating that "the position you applied for has been filled." This is poor public relations.

Although the content of such letters may be drawn from sample form letters, care should be taken to make each letter fit the situation precisely. And each letter should be an "original" copy, typed on good-quality letterhead. If your institution has word processing equipment, this is a simple matter. If not, it's still worth the time and expense involved to create a good impression. An example of a well-developed letter is shown in sample 17.

Keeping Records

One way to keep track of the process and progress within it so that your letters can reflect reality and staff can manage the process effectively is to devise a record-keeping system. Files can be set up to organize application materials by logical categories: materials for applicants under consideration in one location; materials in an active file for those applicants to be considered should an opening occur; other materials in an inactive file. The filing system--by division or coding of material--should also be set up to allow ready access of material. In other words, when an opening occurs in the cosmetology department, it should be easy to pull the files of those applicants certified in the area of cosmetology. Further, if questions are raised regarding your commitment to affirmative action/equal opportunity, material must be readily available to document your commitment.

SAMPLE 15

INTENT TO HIRE FORM

NAME: _____ DATE: _____

STREET: _____

CITY & STATE: _____

It is a pleasure to offer you an appointment as a teacher in the Anycity School District. I sincerely hope that you decide to become a member of our educational team. If you will accept our offer, you should sign this Intent to Hire and return it to my office within _____ days. Upon receipt of your signed acceptance, your appointment will be approved by the Board of Education at its next meeting. You will then be issued a contract to sign. It may be a period of several days before you receive this contract. Lest you be concerned in the interim, this letter makes your appointment valid until you receive your contract.

RETURN ONLY THE ORIGINAL COPY OF THIS INTENT

* *

INTENT TO HIRE

It is my intention to recommend _____ for hiring at the next meeting of the Anycity Board of Education. This recommendation is made on the basis that you either hold or will hold a valid certificate to teach in the State of Ohio on or before September 1, _____.

The act of signing this statement obligates you to accept a teaching position in the Anycity School District for the ensuing year at a salary of _____ ($_____) according to the adopted salary schedule of the Board of Education.

Your tentative assignment for the coming school year will be _____ _____.

Training: _____

Experience: _____ _____
TEACHER

Base Salary: _____

_____
Director of Personnel

EMPLOYMENT DATE: _____

SAMPLE 16

LETTER OF NONACCEPTANCE II

Dear _____:

I have completed the screening and have made the selection of the person to fill the position for which you were a candidate. I feel that we were indeed fortunate to have such a well-qualified group of candidates for this position. You should consider it an honor to be considered as a strong candidate among so many fine candidates.

Naturally, we could not employ all candidates, and I am very sorry to inform you that you were not selected to fill the position.

I want to express my appreciation to you for your interest shown in our district and for your time and effort in making application and visiting the district. I will keep your application in our active file and, should another position for which you qualify become open, I will give you every consideration and notify you immediately of the position.

Again, I want to express my sincere thanks to you. My best wishes to you for a successful teaching career.

Sincerely,

Director of Personnel

SAMPLE 17

APPLICANT NOTIFICATION OF STATUS LETTER

Community College of Denver
Red Rocks Campus
12600 West 6th Avenue
Golden, Colorado 80401

August 25, 1981

Dear _____:

Thank you for applying for the position of Director, Human Resources and Services Division, Red Rocks Campus.

There are 191 applicants. The screening process used at CCD is quite lengthy. Therefore, I would like to briefly explain the process so that you may have an appreciation of the time involved.

1. The Cost Center Administrator (CCA) responsible for the position establishes a screening committee comprised of at least three members (in this case, six). Prior to reviewing any of the applications, the committee meets with the Manager of Employee Relations to review affirmative action responsibilities and the College's hiring procedures. Then the screening committee writes specific criteria that will be used for evaluating an applicant's background with respect to the items listed in the job announcement. These criteria must be approved by the CCA.

2. The screening committee then reviews all the applications to determine if the applicants have the required minimum qualifications. Notification is sent to the applicants who do not have the minimum qualifications. For the remaining applicants, points are awarded based upon the criteria and point system previously established.

3. The committee selects a preliminary pool of finalists. The chairperson of the committee notifies these applicants and asks for permission to contact two unlisted references who have knowledge of the applicant's professional ability. After calling these references, the committee selects at least eight applicants who will be invited to the campus for an interview. Upon completion of the interviews, the committee submits to the CCA the names of the top three candidates.

4. The CCA selects one candidate after reviewing the applicants, talking with references and interviewing the finalists. The CCA then submits to the Campus Vice President a written statement of selection and justification for the selection. The Campus Vice President reviews the recommendation and, if in agreement, forwards same to the Office of Personnel Services. The CCA notifies the candidate of the recommendation.

5. The recommendation is forwarded to the Denver Area Council and then to the State Board for Community Colleges and Occupational Education for approval.

In this particular instance, it will be November or later before final approval is received and official employment processing can be completed. We are sensitive to your need for information regarding the progress of the screening process. We will notify you each time a decision point has been reached.

Thank you for your interest in the Community College of Denver.

Sincerely yours,

Dean of Instruction
Red Rocks Campus, CCD

AN AFFIRMATIVE ACTION EMPLOYER

In addition, it is very helpful to prepare and use some sort of form to keep track of the material and information due and received from applicants who are being actively considered for a particular position. This can be simply a checklist, which lists the materials and provides a space to place a check (or note the date) as each item is received (or occurs), e.g.:

_____ Application
_____ Resume
_____ Transcript(s)
_____ Recommendations
_____ Interview
_____ TB Test Results

Or the form can be more detailed such that it becomes a completed summary sheet of all the information received. Space could be provided to note key personal, educational, and experiential data. This is a time-consuming job initially, but it saves time later when one wants to review applicant information.

There are many ways this information could be organized equally efficiently. What is important is that, in setting up the selection process, you realize the importance of creating a system to organize and keep track of all the materials received--and make sure such a system is formulated and implemented.

Evaluating the Process

This is the last section in the fifth learning experience in this module, but that does not mean that evaluation should be an afterthought. Evaluation of any process you implement as an administrator should be structured at the outset and should be continuous throughout the implementation effort.

Thus, in implementing a staff selection process, you need to build in an evaluation component. You need to decide what will be evaluated and how. In all likelihood, you will want to evaluate such elements as the following:

- Personnel policy (Is it up to date, complete, clearly stated?)
- Selection staff (Are they qualified or adequately trained? Is staff time used effectively?)
- Assessment of staffing needs (Is the assessment process systematic and rational? Is assessment part of program and budget planning?)
- Selection criteria (Do the criteria reflect the actual position and the need for equity? Are they documented through job descriptions or some other device?)
- Recruitment devices (Are adequate contacts developed and maintained? Are contacts provided with sufficient information? Are the right audiences being reached? Is equal opportunity ensured?)

- Selection and screening devices (Are the right devices being used to get the information needed? Are they well developed? Is information being weighted fairly and equitably?)
- Management devices (Do candidates know their status? Can information be retrieved when needed?)

The answers to such questions can be acquired using standard formal and informal evaluation devices. For example, an item on the application form can request information about how the applicants happened to apply for the job. By compiling that information and supplementing it with information gathered directly from candidates, perhaps during interviews, you can determine which recruitment devices or sources seem to be most effective. Similarly, applicants--successful and unsuccessful--can be selected randomly to react to a brief questionnaire on the effectiveness, fairness, and humaneness of the process to which they were subjected. Written materials--personnel policy, job descriptions, application forms, tests, and so on--can be reviewed regularly and revised as necessary.

By including an evaluation component as an integral part of the selection process, you can go a long way toward ensuring that your selection process meets--and will continue to meet--the needs of the government, the institution, and the applicants.

You may wish to arrange through your resource person to visit and interview an experienced administrator at the secondary or postsecondary level to determine how he/she manages the staff selection process. Before the interview takes place, you should prepare a list of questions, such as the following, that you wish to have answered:

- How are applicants kept informed of their status? Are form letters used? Are they personalized to fit each situation? Are letters typed or duplicated?
- What records are kept? How are they filed? How are they used?

The following "Case Study" describes how a vocational/technical administrator managed the staff selection process. Read the situation and critique in writing the performance of the administrator described: what did he do correctly, what did he do incorrectly, and what should he have done instead?

CASE STUDY

Jane Randolph was up to her ears in application forms, applying far and wide for a teaching position in the area of computer programming. However, given a choice, she would have liked to work in northern Colorado where she could fully exercise her keen interest in skiing and backpacking. Although she regularly checked all the resources she knew of--employment agencies, bulletin boards at local institutions with computer training programs, professional journals and newspapers--she had seen no openings there.

She decided to take the bull by the horns. She looked in the library for directories of educational institutions, located the addresses of northern Colorado institutions offering computer training programs, and sent unsolicited letters of inquiry. One institution, with particular appeal to her, was Aspen Tech.

One month later, Jane received a response from Aspen Tech (see p. 92). Encouraged, she immediately reviewed the brochure, which contained photos of and information concerning the institution, the community, and the expectations for teaching staff. She then completed and mailed the application form and arranged to have her transcripts forwarded.

As the fall term approached with still no response from Aspen Tech, Jane began to worry. She decided to call the personnel office and inquire about her status. When she got through to Mr. Armentrout, he was very apologetic. An enormous number of applications had been received, he said, and the initial screening process was taking longer than expected. He asked her to hold a second while he asked his secretary to get Jane's file. The secretary promptly located it for him. He scanned it, and indicated that, according to the tracking/rating sheet on the cover, she was one of the top contenders thus far. As long as he had her on the phone, he said, would she like to set up an interview?

An interview date and time was arranged, and three days later, Jane received a written confirmation, together with a map and information about transportation options. The trip and the interview were a success.

On September 3rd, she received another letter from Mr. Armentrout indicating that the screening and selection process had been completed and that one of the jobs was hers if she wanted it. Obviously the waiting had paid off. Later, when she'd been on the job for several months, she found out from a colleague that her experience was not unique. The colleague had experienced much the same thing two years previous to Jane's experience. They both agreed that poor Mr. Armentrout was understaffed.

ASPEN TECH
ASPEN, COLORADO
(303) 444-1212

July 14, 19--

Ms. Jane Randolph
4 Main Street
Lexington, KY

Dear Ms. Randolph:

Thank you for your interest in teaching computer science at Aspen Tech.

We have, at present, to positions open in that area. I am enclosing an application form, together with a brochure describing our institution.

Again, we appreciate your interest, and I would be pleased to receive your application. If we may be of any further asistance, please do not hesitate to contact this office.

Sincerely,

John Armentrout
Director of Personnel

Compare your completed written critique of the "Case Study" with the "Model Critique" given below. Your response need not exactly duplicate the model response; however, you should have covered the same major points.

MODEL CRITIQUE

Although Jane's experience was ultimately successful and Mr. Armentrout's performance during and after her phone call was quite competent, the total process cannot be considered to have been managed in a thorough, fair, and humane manner. We don't, of course, know what was happening with Jane's other applications. However, it is conceivable that she would have had to turn down a less ideal, but acceptable offer in order to wait out the much belated Aspen results. Had the Aspen job not been offered to her at long last, this could have been most unfortunate for her.

The response turn-around time at Aspen is not good, for the most part. It should not have taken staff a month just to acknowledge her unsolicited letter of inquiry. She should not have had to wait so long with no acknowledgement of her application materials. Decision or no decision, the fact that the materials had been received should have been acknowledged. Even better, an explanation could have been included in the acknowledgement letter, explaining the fact that the process was being delayed due to the number of applications received. That way. Jane would have known more clearly what to expect; much of her anxiety could have been eliminated.

The one letter we are shown also has some problems. The content is adequate and the enclosures are appropriate. However, when using duplicated letters, it really is important to make every effort to minimize the impersonal qualities inherent in such a letter. In this case, the "personal" information has been typed in a different type size, which highlights the fact that the letter is a form letter. In addition, when you are going to mass duplicate a form letter, it should be carefully proofed first to eliminate spelling and typographical errors. This letter has two such errors.

Mr. Armentrout handled the situation admirably, however, when Jane finally called him. She was able to reach him directly and his phone manner was encouraging and personal. Apologies were due, and he offered them. His filing system can be assumed to be quite good given the speed with which her file was located. And the system used to track and rate application materials allowed him to give Jane an immediate and accurate picture of her status. Using the opportunity to set up an interview time was also appropriate. It is probable that Mr. Armentrout's performance at this point left Jane appeased and even somewhat impressed--an impression that would be immediately reinforced when she received the confirmation letter and map.

Unfortunately, there is no evidence that the flaws in the system will ever get ironed out, and staff shortage is no excuse. Either additional

staff--at least part-time staff during peak hiring periods--or improved methods are needed. Without concern for continually evaluating the process--and acting on the evaluation findings--nothing will change. Why is it that, with two openings available, Jane could find no notice of vacancy? One wonders if information was solicited from her--or other applicants--concerning how they happened to apply. Based on her experience on the job for a few months, we can assume that Mr. Armentrout never formally or informally solicited her feelings about the process to which she was subjected.

Mr. Armentrout needs to stop assuming that the process is irrevocably limited by staff limitations. Despite his charm and competence in some areas, he is subjecting applicants to an inhumane process. He needs to build an evaluation component into the process through which he can document problems and seek support for solutions.

Level of Performance: Your completed written critique should have covered the same major points as the "Model Critique." If you missed some points or have questions about any additional points you made, review the material in the information sheet, "Managing the Staff Selection Process," pp. 83-90, or check with your resource person if necessary.

Learning Experience VI

OVERVIEW

After completing the required reading, critique the performance of an administrator in a given case study in orienting staff.

You will be reading the information sheet, "Orienting Staff," pp. 97-103.

You may wish to interview an experienced administrator to determine how staff at his/her institution are oriented.

You will be reading the "Case Study," pp. 105-106, and critiquing the performance of the administrator described.

You will be evaluating your competency in critiquing the administrator's performance in orienting staff by comparing your completed critique with the "Model Critique," p. 107.

NOTES

Activity

For information about how to effectively orient new personnel to the system, read the following information sheet.

ORIENTING NEW PERSONNEL

A vital part of the staff selection process is helping new staff make the transition into your institution. Until the new staff members feel that they are a part of the system, they will not be able to fully achieve their personal goals or contribute to those of the organization.

The purposes of orientation range from providing the new employee with information about the community and assisting in such decisions as finding suitable housing to facilitating the integration of the individual with other new and veteran colleagues. From the day they are hired, new employees need to know--or know where to find--basic information about the institution. They need the confidence that they have the support of the administration and to feel good about themselves in their work. In the case of recent college graduates, help is needed in making the transition from the theoretical to the reality.

In the case of nonprofessional/noninstructional staff, the orientation may be somewhat simpler and may not involve you directly. These personnel frequently are local people to begin with and do not need to be oriented to the community. Furthermore, they are concerned with more limited tasks within the institution: the clerical person needs to understand office procedures as practiced in your institution; the custodian needs to know his/her custodial responsibilities in your institution; and so on. These can be conveyed to the new employee by his/her immediate supervisor on an individual or small-group basis.

In the case of the professional/instructional staff, however, orientation may be a more major undertaking. These people frequently need a wide range of information about the community, general and specific duties and responsibilities, school policies, curriculum, professional organizations, employee benefits, and so on. Because of the extent of this needed orientation and your direct responsibility for providing it, this information sheet deals primarily with orientation of professional/instructional staff.

The following is a list of the sorts of information needed by prospective and new staff members.[3] Some items would be relevant only to instructional

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3. Adapted from John L. Morris, "The Interview: Guidelines for Making It a More Effective Hiring Device," The Clearing House. 46 (September 1971): 37-38.

staff; other items, such as sick leave policy, would apply to any new staff member.

- Institution's philosophy of education
- Salary
- Length of school year
- Availability of formal orientation sessions
- Location, size, and layout of classroom
- Courses/levels to be taught/teaching load
- Availability of consultant services
- Evaluation criteria
- Promotion opportunities
- Fringe benefits
- Availability of conference/planning periods
- Opportunity to participate in curriculum planning and development
- Special duties involved/extra assignments
- Sick leave policy
- Availability and cost of meals
- Transportation available
- Mandatory obligations to join professional organizations
- Dress code
- Discipline philosophy
- Requirements for salary advancement
- Subsidization of further education
- Retirement plan
- Opportunities for extracurricular and summer employment
- Grading/reporting policies
- Availability of tenure
- Availability of a "buddy" system
- Layout of facilities
- Availability of and procedures for acquiring equipment and supplies
- Curriculum and teaching materials to be used (e.g., required text)
- Lesson plan requirements
- Meetings required

You, as a vocational/technical administrator, cannot conduct the orientation alone. There must be involvement from many parts of the institution to ensure that both a person's professional and personal needs are met.

Planning the Orientation Activities

The orientation process is not something that occurs during one or two large-group sessions when the employee starts work. Orientation begins with the first contact with the prospective employee and continues throughout the first year or two of the new staff member's employment.

When the prospective employee first contacts the institution, it is standard to provide descriptive information as well as an application form and cover letter. This is the beginning of the orientation process. The form in which the descriptive information is provided varies generally from a one-page photocopied sheet to a printed and illustrated brochure or booklet. The availability of funds will determine the form you will use. Included are the following types of information:

Community Information

- Physical size
- Population
- Location
- Economic make-up; principal products
- Governmental structure
- Availability of stores, religious facilities, clubs and organizations, recreational facilities, cultural events, medical services, institutions of higher education
- Housing available
- Living costs (average costs [or range] of apartments, houses, food staples, misc.)
- Transportation available
- Proximity to major cities

Institutional Information

- Size of institution or district
- Available facilities; dates built; projected construction
- Enrollment
- Number of teaching staff
- Average teaching load
- Teacher-student ratio

- Length of school year
- Curriculum; philosophy
- Special programs
- Special services
- Special benefits
- Salary schedule
- Map showing how to get to the institution
- Where support money comes from and goes (pie chart)
- Organizational chart
- Organizational pattern

List of Employment Requirements

- Degree (e.g., B.A.)
- Good academic record
- Certification
- Health (e.g., "evidence of good health")
- Personal characteristics (e.g., enthusiasm, patience, perseverance, self-reliance, organization, ability to express self clearly, sensitivity, commitment to the profession)
- Professional and character references
- Citizenship
- Related work experiences

Procedures for Application

- Who to contact and how (name, address, phone number)
- What to send (application, transcript, resume, references)
- How to reach institution (by train, by car, by air)

Obviously, this could be a great deal of information; however, at this stage, information should be provided in brief, introductory form. A list of statistics about the community would suffice to provide an introductory overview. This is not the place to expound at length on any one topic.

During the interview, these topics can be orally expanded on to extent. More information would generally be provided on institutional philosophy and employee benefits, for instance. Questions from the candidate would also require the provision of more detailed information in some areas. A tour of the facilities may be arranged. Or the candidate could be introduced to other staff members.

Once the candidate has been hired, thorough information must be provided, but not all at once. Providing too much information all at once lessens the chances of any of it being absorbed. Information should be provided in smaller doses and through a variety of approaches. To decide what information to provide, when, and how, you need to consider what information the staff member(s) will need at that time. The time of the need will help determine the form to be used to present the information.

For example, a group of new staff starting at the beginning of a term could be oriented to general institutional procedures and their responsibilities in a small-group presentation. Policy handbooks could be provided to supplement this information, allowing new staff to look up answers to specific questions as they arise. On the other hand, a new staff member coming on board midterm could be oriented on an individual basis by an immediate supervisor or veteran colleague.

Some information could be best provided at the district level (in secondary schools), some at the institution level, some at the grade level, and some at the department level. Information about specific duties and responsibilities is needed immediately; information about the library or audiovisual services could be provided later. Large-group presentations may be the best device for providing some information; other information could best be provided in small-group or individual sessions. Some can be conveyed best in written form, through handbooks, handouts, bulletins, or memos. Some can be best provided through tours or observations.

General considerations in planning the orientation activities are as follows:

- Is the content based on the needs of new employees and the objectives of the institution?
- Do the activities have your support and that of other administrators? Are you willing to accept responsibility for providing high-quality activities?
- Have you involved in the initial planning those persons who will be conducting the various activities?
- Will the orientation effort continue throughout the entire first year of the new member's employment?
- Will the institution support the orientation activities as the initial step to a continuing commitment to the inservice training of employees?
- Are the activities so few as to be ineffective or so comprehensive as to be overwhelming? Will the activities have sufficient scope to allow the new employee to function well in the institution?
- Do you plan to evaluate the effort objectively to ensure the timeliness of topics and the effectiveness of activities?
- Do the facilities lend themselves to a relaxed atmosphere? Are comfortable chairs and refreshments provided?

- Have recent additions to the staff (one- to three-year members) been involved in helping to plan the orientation sessions?
- Has some type of opportunity been scheduled for newcomers to meet other staff and/or administrators?

Initial Orientation Sessions

Individuals chosen to make presentations in initial large-group sessions are usually those with whom the new employees are likely to come into frequent contact and/or those who will have high visibility. These individuals should be familiar with the practices of the institution and the policies of its governing board.

Introductory remarks and expressions of welcome should be included from persons other than administrators such as members of the board, the teacher's organization, professional organizations, student organizations, and the community. Ample opportunity should be provided throughout all orientation sessions for the new employees to ask questions of all presenters.

General information about the following topics is usually appropriate for new instructional staff: payroll deductions; fringe benefits; overtime; promotion; tenure; probation; performance evaluation; sabbaticals; absences such as military leave, jury duty, sickness, death in the family; holidays; vacations; professional development opportunities; termination and transfer; and state and federal regulations. For groups of new administrators, custodians, or clerical persons, additions or deletions to the above will be required.

A subsequent stage of the orientation should deal with information about the department or unit in which the employee will be working. Persons involved would normally include building administrators, department heads, and directors of student services such as guidance and counseling.

Appropriate topics for these sessions are staff meetings, parking, building security, housekeeping in classrooms and shops, due dates for reports, grade reporting processes, special calendar events, discipline, extra duty, selection of texts, requisitioning of supplies and equipment, committee assignments, and involvement with advisory committees. Again, for administrators or nonprofessional persons, additions and deletions will be needed.

Many institutions, as part of the in-processing procedure, assign an experienced staff member as the new employee's "buddy" or "host." These staff members are usually people whose assignments or locations will bring them in frequent contact with the new employee. The buddy becomes the recognized contact person or assigned sponsor and is available to help the new employee adjust to the new environment by answering questions, giving advice, etc.

During the orientation process--as various administrators and others discuss personnel policies, student procedures, and the many other topics that

will be of interest and concern to new employees--new staff should be given written copies of the personnel handbook, student rules and procedures, and the many other items they will need to refer to. Some institutions prepare handbooks for both faculty and students that contain the bulk of the many policies and procedures that need to be known by all organizational members. To ensure that the objectives of the orientation process have been accomplished, some institutions have developed special forms (activity or topical checklists) to help guide the procedure.

As part of the orientation process, you will probably want to inform new employees about both staff development efforts and the processes surrounding employee evaluation. Both topics are of sufficient complexity to warrant special consideration.[4]

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4. For more information about these topics, you may wish to refer to Provide a Staff Development Program and Evaluate Staff Performance, part of the Competency-Based Vocational Education Administrator Module Series (Columbus, OH: The National Center for Research in Vocational Education, The Ohio State University, 1981).

You may wish to arrange through your resource person to visit and interview an experienced administrator at the secondary or postsecondary level to determine how staff at his/her institution are oriented. Before the interview takes place, you should prepare a list of questions, such as the following, that you wish to have answered:

- How is content determined?
- What methods are used to orient new staff?
- Over what time period is orientation provided?
- Who is involved in planning and implementing the orientation program?
- What written materials are used?
- What is the estimated cost of the orientation program?

The following "Case Study" describes how a vocational/technical administrator oriented new staff. Read the situation and critique in writing the performance of the administrator described: what did she do correctly, what did she do incorrectly, and what should she have done instead?

CASE STUDY

Based on years of experience, the approach of administrator Estelle LeClair to the orientation of new instructional staff was, she felt, cost-effective and pragmatic. Prior to each term, she held a two-day orientation program for new staff while veteran staff worked elsewhere in the building on individual and group staff development projects. She tried to cover in the orientation program only those key concerns that would affect the initial ability of staff to cope with and adjust to their new roles and responsibilities.

To minimize the potential for dreariness in two straight days of orientation, she used short sessions and alternated methods for presenting information. No one had to sit and listen to one speaker for hours at a stretch. A presentation on personnel benefits by the personnel director, for example, would be followed by a tour of the building or a coffee break during which new staff could meet and mingle with veteran staff members. She included lots of question-and-answer sessions. She used some ice-breaker techniques to lighten the mood. And she provided time for all staff to meet by departments during which time new staff could be oriented to departmental procedures, and discussion of general departmental concerns could be addressed. All this was supplemented with a faculty handbook, bound in a loose-leaf notebook to allow for frequent updating.

A week or so after the orientation sessions, Ms. LeClair sent a questionnaire to each new staff member to complete. The questionnaire had two parts. In part one were specific questions concerning the adequacy and helpfulness of the initial orientation sessions. She used the responses each year to improve the following year's activities. Part two consisted of a list of typical concerns, problems, and information needs of new teachers once on the job--requiring additional orientation activities. She had found that, once involved in the day-to-day activities, teachers were in a better position to say what activities would meet their needs. Each new teacher rated the items on part two from 1 to 5 on a scale of importance.

Based on the results, Ms. LeClair prepared a year-long orientation program designed to meet the most pressing concerns first. Depending on the number of staff expressing concern, the activities were either provided on a full-group, partial-group, or individual basis. The person assigned responsibility for conducting each activity was the person whose responsibility or area of expertise was involved. For example, the librarian provided the orientation to the library procedures, facilities, materials, and equipment.

Ms. LeClair and a person from the computer center shared responsibility for explaining the grading policies and computerized grading system.

One last fact that Ms. LeClair was especially proud of. The orientation program was designed to dovetail into the staff development program, creating a continuous involvement in learning and growing.

Compare your completed written critique of the "Case Study" with the "Model Critique" given below. Your response need not exactly duplicate the model response; however, you should have covered the same major points.

MODEL CRITIQUE

If you correctly evaluated Ms. LeClair's performance, you are probably wondering where she is and how you can convince her to work on your administrative staff. She's a real find. Take a look at her strengths:

- Orientation is presented in small doses, with real concern for maintaining interest.
- Information is provided in the order in which it is needed.
- Information is provided based on the stated needs of new staff, as measured by a carefully constructed questionnaire.
- New staff are oriented not only to new information initially, but also to veteran staff and facilities.
- A variety of staff members are involved in planning and presenting the orientation activities.
- Activities are planned to use staff effectively; if several new staff members shared a concern, a small-group activity was used.
- A well-thought-out plan structures the total process.
- Staff are given a faculty handbook to refer to when in doubt about what they'd been told or to quickly answer new questions not as yet covered.
- Clearly, the orientation program has the full commitment of the administrator, Ms. LeClair.
- And finally, the orientation is not a one-shot deal. It is viewed as a continuous process--part of the total staff development effort.

If one wished to find fault with her efforts, one could point out that her view of orientation could be expanded to include the information that should be provided before employment: brochures accompanying application forms and information provided during the job interview, for example. But, somehow it's hard to believe--despite the fact that she does not include those activities as a stated part of her orientation efforts--that she does less than an excellent job in that area either.

Level of Performance: Your completed written critique should have covered the same major points as the "Model Critique." If you missed some points or have questions about any additional points you made, review the material in the information sheet, "Orienting Staff," pp. 97-103, or check with your resource person if necessary.

NOTES

Learning Experience VII

FINAL EXPERIENCE

While working in an actual administrative situation, select school personnel.*

As part of your administrative duties, select school personnel or direct others in the selection process. This will include--

- establishing the foundations for staff selection, including assessing staff needs
- establishing selection criteria
- recruiting candidates
- gathering and screening information concerning candidates
- managing the staff selection process
- orienting new staff to the institution

NOTE: As your complete each of the above activities, document your activities (in writing, on tape, through a log) for assessment purposes.

continued

*If you are not currently working in an actual administrative situation, this learning experience may be deferred, with the approval of your resource person, until you have access to an actual administrative situation.

FINAL EXPERIENCE continued

Arrange to have your resource person review your documentation. If possible, arrange to have your resource person observe your performance at a point when you are directly involved in the staff selection process (e.g., conducting an orientation session).

Your total competency will be assessed by your resource person, using the "Administrator Performance Assessment Form," pp. 111-114.

Based upon the criteria specified in this assessment instrument, your resource person will determine whether you are competent in selecting school personnel.

Name _____

Date _____

ADMINISTRATOR PERFORMANCE ASSESSMENT FORM

Select School Personnel

Directions: Indicate the level of the administrator's accomplishment by placing an X in the appropriate box under the LEVEL OF PERFORMANCE heading. If, because of special circumstances, a performance component was not applicable, or impossible to execute, place an X in the N/A box.

	LEVEL OF PERFORMANCE					
	N/A	None	Poor	Fair	Good	Excellent
In establishing the foundations for staff selection, the administrator:						
1. reviewed the institution's personnel policy statement for relevant local, state, and federal guidelines.....	☐	☐	☐	☐	☐	☐
2. systematically and rationally assessed staffing needs.....	☐	☐	☐	☐	☐	☐
In establishing selection criteria, the administrator:						
3. identified, for a given job title, the characteristics a person in that position should possess, including:						
a. the background (education and experience) required.....	☐	☐	☐	☐	☐	☐
b. the specific skills required.....	☐	☐	☐	☐	☐	☐
c. other, personal characteristics desired....	☐	☐	☐	☐	☐	☐
4. ensured that, for this job title, a job description reflecting the selection criteria had been or was developed.....	☐	☐	☐	☐	☐	☐

	LEVEL OF PERFORMANCE					
	N/A	None	Poor	Fair	Good	Excellent
5. ensured that the job description included full information and criteria that were:						
a. consistent with personnel policies.....	☐	☐	☐	☐	☐	☐
b. really necessary for the job.....	☐	☐	☐	☐	☐	☐
c. measurable.....	☐	☐	☐	☐	☐	☐
d. practical.....	☐	☐	☐	☐	☐	☐
e. reasonable in number.....	☐	☐	☐	☐	☐	☐
In recruiting candidates to fill a given position, the administrator:						
6. ensured that appropriate contacts were built and maintained (e.g., with teacher training institutions and employment agencies).....	☐	☐	☐	☐	☐	☐
7. directed the preparation of all needed materials, including:						
a. position vacancy notice.....	☐	☐	☐	☐	☐	☐
b. classified advertisement.....	☐	☐	☐	☐	☐	☐
c. brochures.....	☐	☐	☐	☐	☐	☐
d. fliers.....	☐	☐	☐	☐	☐	☐
8. ensured that the position was adequately publicized to secure the desired response and assure that equal opportunity was afforded.....	☐	☐	☐	☐	☐	☐
In gathering and screening information about a candidate, the administrator:						
9. selected, from the following devices, those most appropriate for gathering the needed information:						
a. application form.....	☐	☐	☐	☐	☐	☐
b. letter of application.....	☐	☐	☐	☐	☐	☐

	LEVEL OF PERFORMANCE					
	N/A	None	Poor	Fair	Good	Excellent
c. resume	☐	☐	☐	☐	☐	☐
d. certificates and licenses held	☐	☐	☐	☐	☐	☐
e. recommendations	☐	☐	☐	☐	☐	☐
f. performance records	☐	☐	☐	☐	☐	☐
g. tests	☐	☐	☐	☐	☐	☐
h. interviews	☐	☐	☐	☐	☐	☐
10. prepared, or arranged for the preparation of, the necessary devices, including clear, simple directions and a pleasing format	☐	☐	☐	☐	☐	☐
11. provided for the adequate training of staff involved in interviewing candidates	☐	☐	☐	☐	☐	☐
12. ensured that, in gathering information, only questions covering bona fide occupational qualifications were asked	☐	☐	☐	☐	☐	☐
13. selected the candidate to be hired by screening the information received objectively against the established selection criteria	☐	☐	☐	☐	☐	☐
14. considered both the information presented and the way in which it was presented (e.g., poise and interpersonal skills in the interview; spelling and neatness on the application form)	☐	☐	☐	☐	☐	☐
15. solicited information on a confidential basis to document that equal opportunity and affirmative action guidelines were being met	☐	☐	☐	☐	☐	☐
<u>In managing the staff selection process, the administrator</u>:						
16. kept each applicant informed of his/her status and progress throughout the process	☐	☐	☐	☐	☐	☐

	LEVEL OF PERFORMANCE					
	N/A	None	Poor	Fair	Good	Excellent
17. ensured that all letters sent to applicants were well developed, well produced, and appropriate to the situation.....	☐	☐	☐	☐	☐	☐
18. ensured that a system for organizing, filing, and tracking information was formulated and implemented.....	☐	☐	☐	☐	☐	☐
19. included an evaluation component as an integral part of the selection process.....	☐	☐	☐	☐	☐	☐
In orienting new staff to the institution, the administrator:						
20. planned the orientation content, methods, and timing based on the needs of the new employees and the objectives of the institution.....	☐	☐	☐	☐	☐	☐
21. provided information on the community, the institution, and the specific position.....	☐	☐	☐	☐	☐	☐
22. handled orientation as a continual process, beginning with the first written contacts with applicants and "ending" at the point at which staff development activities take over...	☐	☐	☐	☐	☐	☐
23. involved appropriate others (e.g., board members, teacher organization staff, community members, support staff) in the planning and implementation of the orientation.....	☐	☐	☐	☐	☐	☐

Level of Performance: All items must receive N/A, GOOD, or EXCELLENT responses. If any item receives a NONE, POOR, or FAIR response, the administrator and resource person should meet to determine what additional activities the administrator needs to complete in order to reach competency in the weak area(s).

Additional Recommended References

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